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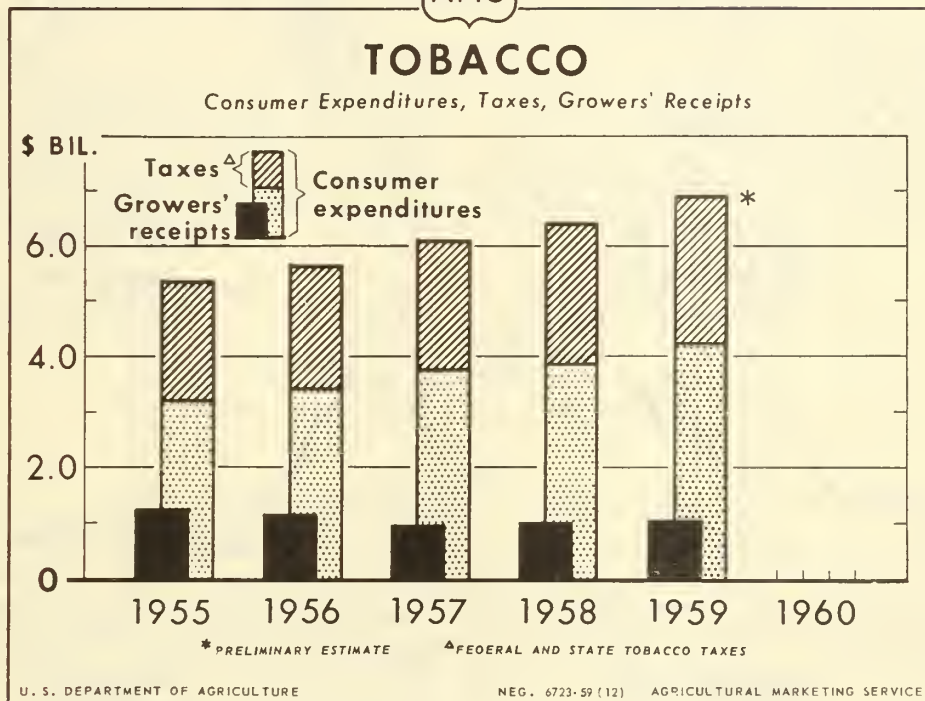
December 1959

FOR RELEASE

DEC. 30, P. M.

TOBACCO SITUATION

TS-90



Consumer expenditures for tobacco products in 1959 are estimated at a record 6.8 billion dollars--7 percent above 1958. Federal and State taxes on tobacco products in 1959 amount to about 2.7 billion dollars--nearly 40 percent of the total spent by consumers. From 1955 through 1959 Federal tax rates on tobacco products were unchanged but in many States tax rates, particularly on cigarettes, were raised and in a few States levied for

the first time. Federal tax receipts rose 15 percent and gross State taxes jumped 60 percent in the past 5 years.

Growers' cash receipts from tobacco sold in 1959 at less than 1.1 billion dollars is a little above 1958 but below each year from 1951 through 1956. From 25 to 30 percent of the tobacco grown is exported; export tobacco faces heavy taxation and other restrictions imposed by governments in many foreign countries.

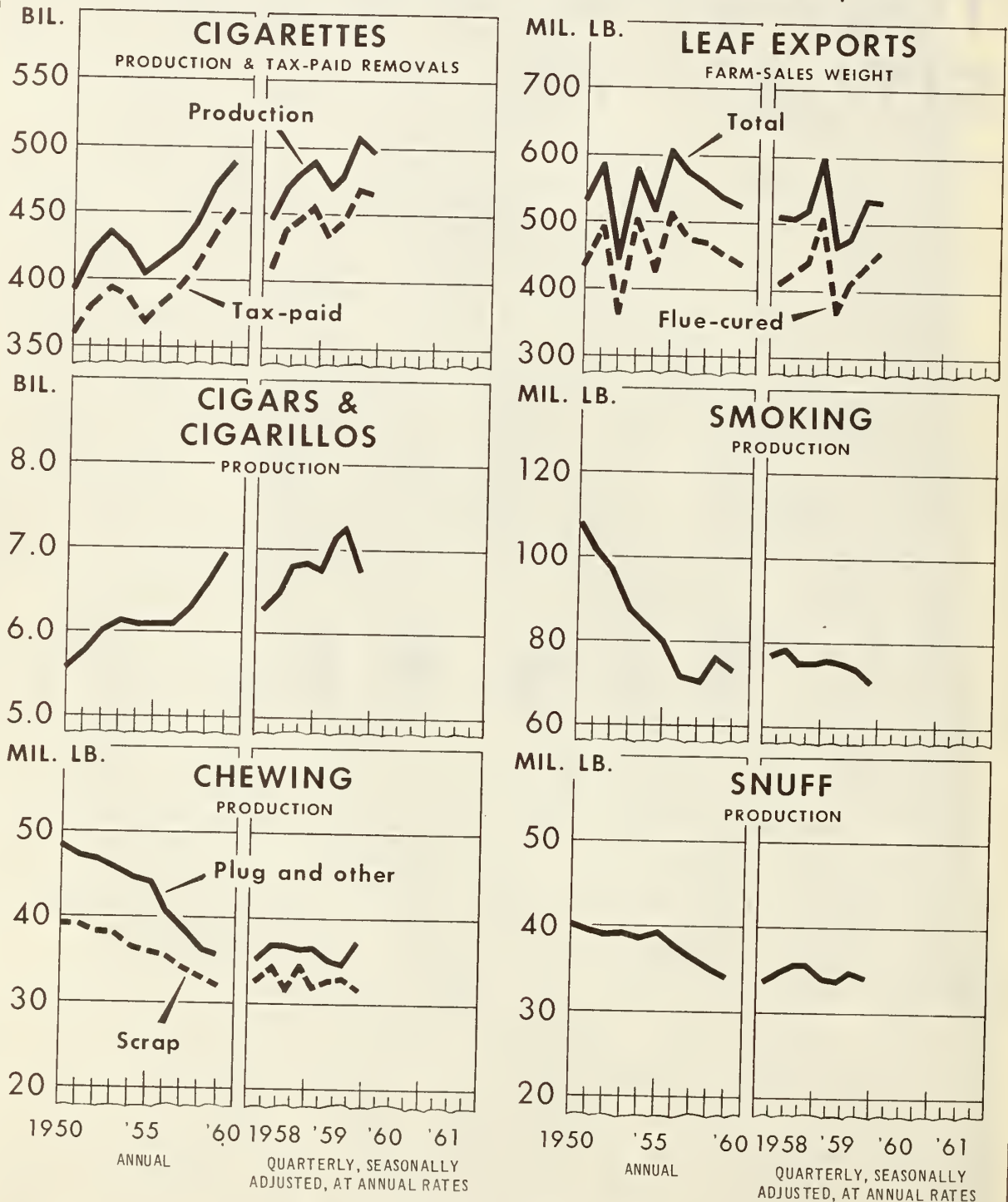
Published quarterly by

AGRICULTURAL MARKETING SERVICE

UNITED STATES DEPARTMENT OF AGRICULTURE

TOBACCO OUTLETS

Recent Trends in Manufactured Products and Exports



LAST QUARTER SHOWN, PARTLY ESTIMATED

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T H E T O B A C C O S I T U A T I O N
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Approved by the Outlook and Situation Board, December 22, 1959

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SUMMARY

Consumption of cigarettes and cigars made appreciable gains in 1959 but that of smoking tobacco, chewing tobacco and snuff declined. Consumption of cigarettes and cigars in 1960 will probably increase further. Not much change is expected in smoking tobacco or snuff, but chewing tobacco will probably continue to decline. The volume of leaf tobacco exports in fiscal 1958-59 was near that of 1957-58, and almost as much seems likely in the current fiscal year.

Output of cigarettes, which utilizes big quantities of flue-cured and burley and also imported and Maryland tobacco, rose to a record high of about 488 billion in 1959--about 4 percent above 1958. This was more in line with annual increases over the longer term, though smaller than the larger-than-usual gain of 6 percent from 1957 to 1958.

U. S. growers of cigarette tobacco have seen virtually no increase in the use of their leaf in the past 5 years. In fiscal year 1958-59, cigarette output topped that of 1954-55 by 17 percent, but use of domestic leaf (farm-sales weight basis) was about the same in both years. If domestic leaf requirements had increased as much as cigarette production over the 5 years, about 200 million pounds more would have been used in 1958-59. Approximately

46 percent of the reduction in the farm-sales weight leaf requirement is attributable to the use of tobacco sheet and additional stems (midribs); about 40-1/2 percent is due to the decrease in size of the tobacco column resulting from the use of filter plugs and some dimensional changes; and about 13-1/2 percent reflects the larger proportion of imported tobacco in cigarette blends.

Total 1959 consumption of cigars and cigarillos by smokers in the United States and its overseas forces is estimated at 6,900 million--about 6 percent above 1958 and well above any year since 1929. In the 1920's cigarillos and near-cigarillo-size cigars were relatively unimportant but in 1959 they probably accounted for around 15 percent of the total. In the 1920's cigars imported from the Philippines totaled around 200 million annually, but in recent years only 4 or 5 million.

In 1959 retail prices of cigarettes and cigars were raised in a considerable number of States because of increased or new taxes. Increases in retail prices due to cigarette taxes became effective in 15 States having 50 percent of the adult population; increases in retail prices due to cigar taxes became effective in 7 States having 22 percent of the adult population. Of the 50 States, 46 now tax cigarettes and 15 tax cigars. Several large cities and numerous smaller municipalities also tax cigarettes.

The 1959 output of smoking tobacco for pipes and "roll-your-own" cigarettes is estimated at 73 million pounds--4 percent less than in 1958. Exports of bulk smoking tobacco, most of which is not included in the above output figure, probably amounted to over 8 million pounds, a new high.

The 1959 outputs of chewing tobacco and snuff, estimated at 67-3/4 and 34 million pounds respectively, were both a little lower than in 1958. The chewing tobacco output is indicated to be a record low, and snuff output the lowest in over 40 years.

The 1959 calendar year exports of leaf tobacco are estimated at near 470 million pounds declared weight (equivalent to about 525 million pounds farm-sales weight)--about 2-1/2 percent less than in 1958 and 4 percent less than the recent 10-year average.

The 1960 marketing quotas and acreage allotments for burley, fire-cured, dark air-cured, sun-cured, Maryland, Connecticut Valley binder and Ohio filler-Wisconsin binder tobaccos will be announced by February 1. Soon after the announcements, growers of Maryland, Connecticut Valley binder, and Ohio filler-Wisconsin binder will vote in separate referendums on whether they favor marketing quotas on their 1960, 1961 and 1962 crops. Quotas were approved in previous referendums for the 1960 crops of flue-cured, burley, fire-cured and dark air- and sun-cured.

The 1960 national flue-cured quota and acreage allotment was announced November 23. The allotments for practically all farms remain the same as in the last 3 years. The 1959-60 total supply of flue-cured is about 3 percent

lower than a year earlier, nearly all due to the decline in carryover. Carryover of flue-cured by July 1, 1960 (beginning of the 1960-61 marketing year) will be reduced still further since disappearance will exceed 1959 production. If yields per acre in 1960 are near the 1957-59 average, the crop plus the carryover will provide a 1960-61 total supply approximately 3 percent less than for the current year.

Marketings of the 1959 crop of flue-cured have been completed. Prices for the crop as a whole averaged near 58 cents--practically the same as in 1958, though varying by belts. About 5 percent of the crop was placed under Government loan, far less than for most other postwar years.

The 1959-60 total supply of burley is 1 percent lower than for 1958-59. The 1959 crop is about 7 percent above the 16-year low of 1958 but the decline in carryover more than offsets this increase. Some further reduction in carryover will occur by next October 1 since disappearance in the current marketing year is expected to exceed 1959 production. Approximately 90 percent of the crop had been marketed by December 18 when the auctions closed for the holidays. Prices for this volume averaged 60.7 cents per pound--9 percent less than in the comparable period last season. In general, quality was not as good as in 1958. Receipts under Government loan amounted to about 2-1/2 percent of deliveries.

Total supplies of Maryland tobacco, type 32, are estimated to total 3-1/2 percent lower in 1959-60 than in 1958-59, and the lowest in 9 years. Exports of Maryland were up sharply in 1958-59 and the largest since the mid-1920's.

The total supply of fire-cured for 1959-60 is 1 percent below 1958-59 and the smallest on record; the 1959-60 total supply of dark air-cured and sun-cured tobacco is 6 percent below 1958-59 and second smallest on record. Although 1959 production was up substantially from the all-time lows of 1958, carryovers were well below a year earlier. Total 1959-60 supplies of fire-cured and dark air-cured are still large in relation to prospective disappearances.

Prices for early season sales of Virginia fire-cured averaged fairly close to a year earlier but for dark air-cured and Virginia sun-cured they averaged below a year ago.

For Pennsylvania and Ohio cigar filler tobacco, the 1959-60 total supply is about 2 percent above 1958-59. The Pennsylvania crop was the largest in 8 years but still brought prices averaging about an eighth higher than in 1958.

The 1959-60 total supply of Connecticut Valley binder tobacco is fairly close to the low of 1958-59. Domestic use of Connecticut Valley binder in 1958-59 was down sharply, only three-fifths as much as a year earlier. The widespread conversion from natural leaf binders to processed sheet binders in cigar manufacture has had its sharpest impact on the Connecticut Valley binder growers and greatly reduced requirements for these types. Exports of these types also fell sharply in 1958-59.

A $4\frac{1}{2}$ percent increase in supply of the Wisconsin binder types over the record low of 1958-59 is estimated for 1959-60. Domestic use of these types in 1958-59 declined about a sixth below a year earlier but exports increased a little.

Shadegrown cigar wrapper supplies for 1959-60 are about $4\frac{1}{2}$ percent above 1958-59 and a record high. Domestic use of these types has stayed within a narrow range in the past few years; exports in 1958-59 and 1957-58 were each above any previous year but dropped sharply during the first third of 1959-60.

Under existing law, the Government price supports for the kinds of tobacco under Federal marketing quotas in 1960 will be supported at 90 percent of parity except for fire-cured, dark air-cured and sun-cured types. The support levels for the latter types are set at fixed percentages of the burley support (75 percent for fire-cured and $66\frac{2}{3}$ percent for dark air- and sun-cured) but they cannot go above 1957 levels unless 90 percent of their own parities exceed the 1957 levels. The flue-cured support level increased 7.5 percent from 1957 to 1958 and 1.6 percent from 1958 to 1959; the burley support level increased 7.2 percent from 1957 to 1958 and 3.2 percent from 1958 to 1959. Under the parity formula provided by law and assuming the current level of the parity index (prices paid by farmers, including interest, taxes and wage rates), the 1960 parities of flue-cured and burley will be higher than when their 1959 support levels were determined.

TOBACCO PRODUCTS

Cigarettes

Cigarette consumption and output set new record highs in 1959 and further increases appear likely in 1960. U. S. smokers consume about 96 percent of total output, and the other 4 percent is exported to numerous foreign markets (around 100 countries).

The total number of cigarettes produced in calendar year 1959 is estimated at 488 billion--about 4 percent above 1958. The gain in 1959 is in line with longer term annual increases experienced by the cigarette industry, though not as much as the unusual 6 percent increase from 1957 to 1958.

U. S. growers of cigarette tobacco have not experienced a parallel increase in the use of their leaf in the last 5 years. Tobacco leaf usings in comparison with cigarette output can most readily be measured on a fiscal year basis. From fiscal year 1954-55 to fiscal year 1958-59 cigarette output rose 17 percent but use of domestic leaf in cigarettes (farm-sales weight equivalent) was virtually the same in both years. In effect this means that domestic leaf requirements were about 200 million pounds, farm-sales weight basis, less in 1958-59 than they would have been if certain changes had not occurred in the past 5 years. This reduction in leaf usings has largely resulted from (1) technological innovations in processing and manufacture, (2) shifts in the consumption

Table 1.--Cigarettes: Total output, domestic consumption, shipments and exports for specified periods

| Period | Total output | Domestic consumption 1/ | Shipments to | | Exports |
|---------|--------------|----------------------------|------------------------------|----------------------------------|----------|
| | | | Overseas forces and other 2/ | Puerto Rico and U. S. islands 3/ | |
| | Billions | Billions | Billions | Billions | Billions |
| Average | | | | | |
| 1935-39 | 164.2 | 157.0 | 0.9 | 0.8 | 5.5 |
| 1940-44 | 256.9 | 223.5 | 26.5 | 1.0 | 5.8 |
| 1945 | 332.2 | 267.2 | 56.9 | 1.2 | 6.9 |
| 1946 | 350.0 | 321.7 | 5.0 | 1.6 | 24.1 |
| 1947 | 369.7 | 335.4 | 10.4 | 1.1 | 22.8 |
| 1948 | 386.8 | 348.5 | 12.8 | 1.7 | 25.2 |
| 1949 | 385.0 | 351.8 | 12.0 | 1.7 | 19.5 |
| 1950 | 392.0 | 360.2 | 15.6 | 1.9 | 14.3 |
| 1951 | 418.8 | 379.7 | 20.1 | 2.0 | 16.8 |
| 1952 | 435.5 | 394.1 | 21.7 | 1.9 | 16.4 |
| 1953 | 423.1 | 386.8 | 18.8 | 2.0 | 16.2 |
| 1954 | 401.8 | 368.7 | 15.9 | 1.8 | 15.4 |
| 1955 | 412.3 | 382.1 | 13.2 | 2.0 | 15.1 |
| 1956 | 424.2 | 393.2 | 13.3 | 2.0 | 15.7 |
| 1957 | 442.3 | 409.4 | 13.7 | 2.1 | 17.0 |
| 1958 | 470.1 | 436.4 | 13.4 | 2.2 | 18.1 |
| 1959 4/ | 488.0 | 451.5 | 13.7 | 2.5 | 19.2 |

1/ Tax-paid removals including Alaska and Hawaii. 2/ Includes ship stores and other smaller tax-free categories. 3/ Includes Virgin Islands, Guam, American Samoa, Wake, and Canton and Enderbury Islands. 4/ Estimated.

Basic data but not the estimates compiled from reports of the Internal Revenue Service and the Bureau of the Census.

Table 2.--Cigarette exports from the United States to leading destinations for specified periods

| Country | Average 1952-56 | 1957 1/ | 1958 1/ | January-October | | |
|--------------------|--------------------|------------|------------|-----------------|------------|------------------------------------|
| | | | | 1958 1/ | 1959 1/ | 1959 as a percentage of 1958 |
| | Millions | Millions | Millions | Millions | Millions | Percent |
| Venezuela | 1,648 | 2,336 | 2,507 | 2,114 | 1,936 | 92 |
| Morocco | 1,744 | 1,942 | 2,107 | 1,788 | 1,924 | 108 |
| France | 786 | 1,321 | 1,305 | 1,052 | 1,052 | 100 |
| Hong Kong | 817 | 1,224 | 1,128 | 950 | 1,134 | 119 |
| Belgium | 723 | 644 | 1,030 | 775 | 730 | 94 |
| Singapore 2/ | 689 | 931 | 905 | 766 | 798 | 104 |
| N. Antilles | 584 | 346 | 736 | 599 | 742 | 124 |
| Sweden | 726 | 625 | 581 | 510 | 402 | 79 |
| Kuwait | 225 | 422 | 514 | 417 | 553 | 133 |
| Italy | 443 | 424 | 470 | 393 | 376 | 96 |
| Other countries 3/ | 7,388 | 6,778 | 6,784 | 5,881 | 6,699 | 114 |
| Total | 15,773 | 16,993 | 18,067 | 15,245 | 16,346 | 107 |

1/ Preliminary. 2/ Includes British Malaya. 3/ Includes about 95 to 110 foreign destinations in recent years.

and output pattern, and (3) the increased proportion of imported tobacco in blends. Approximately 46 percent of the reduction in the farm-sales weight leaf requirement is attributable to the use of tobacco sheet and additional stems (midribs); about 40 1/2 percent is due to the decrease in the size of the tobacco column resulting from the use of filter plugs and some dimensional changes; about 13 1/2 percent of the reduction in the past 5 years reflects the larger proportion of imported tobacco in cigarette blends.

It seems likely that the factors at work in the past 5 years have not yet run their course. While the rate of gain has slowed, the proportion of the market held by filter tip cigarettes will probably continue to increase at a gradual rate. Several new filter tip brands have been placed on the market or tested during the past several months. Trade estimates indicate that close to half of the cigarettes were filter tip in 1959, compared with 45 percent in 1958 and 9 percent 5 years ago. How much additional impact the use of processed tobacco sheet and stems will have cannot be accurately assessed, but there can be little doubt that every effort will be made to increase the yield of tobacco material suitable for smoking from the purchased quantities of farm-sales weight tobacco. Prior to World War II, the proportion of imported tobacco in the average cigarette (finished weight basis) ranged between 11 and 12 percent. It dropped during the War to around 7 percent, then rose to 8 to 9 percent in most years since the War. But in the last 3 or 4 years, it increased to an estimated 10 1/2 percent in fiscal year 1958-59 and is approaching the prewar percentage.

U. S. consumers spent over \$5.9 billion on cigarettes in 1959--7 percent more than in 1958. The increase reflects larger volume, higher retail prices due to increases in State and city taxes, and the greater proportion of filter tips which are higher-priced than nonfilter tips.

During 1959, the cigarette tax rates of 14 States were raised by 1 to 3 cents per pack and California levied a tax, 3 cents per pack, for the first time. On the average, the retail price of cigarettes per package was increased about 8 percent by levies in these States which have about 50 percent of the U. S. adult population. Cigarettes are taxed in 46 of the 50 States, and in the District of Columbia. The rates of tax range from 2 to 8 cents per package of 20 and now average about 5 cents. The number of States applying each rate is as follows:

| <u>Number of States</u> | <u>Cigarette tax, cents per pack</u> |
|------------------------------------|--|
| 2 (also District of Columbia)..... | 2 |
| 8 | 3 |
| 1 | 3 1/2 |
| 6 | 4 |
| 17 | 5 |
| 1 | 5 1/2 |
| 7 | 6 |
| 1 | 7 |
| 3 | 8 |

In addition to Federal and State taxes on cigarettes, several cities including New York City, Baltimore, St. Louis, Kansas City, Denver, Memphis and numerous smaller municipalities impose a tax on cigarettes.

The Federal cigarette tax is 8 cents per pack but will revert to 7 cents on July 1, 1960 unless this reduction is again postponed by legislation. The Federal tax rate was increased from 7 to 8 cents in the Korean War period (November 1951) and originally was to return to the 7 cent rate on April 1, 1954. But amendments to the law have postponed the return to the pre-November 1951 rate 6 times.

In the 4 States with no State tax on cigarettes (Colorado, North Carolina, Oregon, Virginia), the 8-cent Federal tax constitutes 38 or 39 percent of the retail price. In 12 States, the combined Federal and State cigarette tax accounts for about 42 to 47 percent of the retail price and in 23 States it accounts for 48 to 52 percent; in the other 11 States the total tax ranges between 52 and 56 percent of the retail price.

Retail cigarette prices vary considerably according to (1) retail outlet (e.g., supermarkets, chain drugstores, vending machines, hotels, etc.), (2) unit of purchase (e.g., single pack, multiple pack, carton, etc.), (3) applicable State and local taxes and (4) kind of cigarette (nonfilter, king size, filter tip, etc.). Agricultural Marketing Service data for 1958 on average prices paid in independent and chain stores by States indicated a range of from 20.3 cents in Virginia to 30.8 cents in Louisiana and a U. S. average of 24.4 cents. The September 1959 U. S. average was 25.3 cents per pack--3.7 percent above the 1958 average.

Cigars and Cigarillos

Total 1959 consumption of cigars and cigarillos by smokers in the United States and its overseas forces is estimated at 6,900 million--about 6 percent above 1958 and well above any year since 1929. Consumption in 1920 hit a peak of about 8,500 million and in 1921-29 ranged from 6,800 to 7,500 million. In the 1920's, cigarillos and near-cigarillo-size cigars were comparatively unimportant whereas in 1959 they probably accounted for close to 15 percent of the total. Another difference is that during the 1920's cigars from the Philippines accounted for around 200 million of the total in contrast to only 4 or 5 million in recent years. Bonded manufacturing warehouses located in the United States, which utilize Cuban tobacco, accounted for only around 30 million in the 1920's but in 1959 they produced about 245 million. Overseas personnel of the United States in recent years have probably accounted for the consumption of around 70 million cigars annually while in the 1920's overseas consumption was negligible.

Table 3.--Large cigars and cigarillos: Output and consumption for specified periods

| Period | Domestic factories | | | Bonded manufac- turing ware- house | Ship- ments from Puerto Rico to the United States | Imports for consumption | Exports | | Total consump- tion 2/ |
|----------|--------------------|---------------------|---------------------|--|--|----------------------------|--------------|------|---------------------------------|
| | Total output | Taxpaid removals | Taxfree removals | Taxpaid removals | | Total 1/ | From Cuba | | |
| | Mil. | Mil. | Mil. | Mil. | Mil. | Mil. | Mil. | Mil. | Mil. |
| Average: | | | | | | | | | |
| 1935-39: | 5,075 | 5,060 | 13 | 66 | 29 | 192 | 3 | 8 | 5,352 |
| 1940-44: | 5,450 | 5,282 | 199 | 105 | 11 | 94 | 15 | 9 | 5,682 |
| 1945 | 5,275 | 4,774 | 469 | 82 | 97 | 60 | 60 | 2 | 5,480 |
| 1946 | 5,618 | 5,621 | 26 | 125 | 69 | 22 | 20 | 3 | 5,860 |
| 1947 | 5,488 | 5,460 | 41 | 124 | 8 | 12 | 9 | 19 | 5,626 |
| 1948 | 5,645 | 5,588 | 38 | 140 | 4 | 12 | 10 | 13 | 5,769 |
| 1949 | 5,453 | 5,399 | 46 | 142 | 4 | 11 | 10 | 3 | 5,599 |
| 1950 | 5,399 | 5,365 | 47 | 160 | 3/ | 12 | 11 | 2 | 5,582 |
| 1951 | 5,594 | 5,518 | 85 | 177 | 3/ | 14 | 13 | 3 | 5,791 |
| 1952 | 5,825 | 5,755 | 102 | 196 | 1 | 15 | 12 | 3 | 6,066 |
| 1953 | 5,915 | 5,820 | 90 | 205 | 9 | 17 | 13 | 6 | 6,135 |
| 1954 | 5,820 | 5,690 | 89 | 206 | 47 | 16 | 12 | 8 | 6,040 |
| 1955 | 5,776 | 5,688 | 82 | 227 | 83 | 20 | 15 | 6 | 6,094 |
| 1956 | 5,767 | 5,633 | 72 | 230 | 94 | 23 | 18 | 9 | 6,043 |
| 1957 | 5,903 | 5,757 | 79 | 238 | 122 | 26 | 20 | 9 | 6,213 |
| 1958 | 6,225 | 6,020 | 87 | 240 | 139 | 28 | 22 | 9 | 6,505 |
| 1959 4/ | 6,560 | 6,380 | 102 | 245 | 150 | 31 | 24 | 13 | 6,895 |

1/ Predominant share of imports prior to 1942 came from Philippine Islands.

2/ Total removals from domestic factories plus cigars from bonded manufacturing warehouses, from Puerto Rico and imports minus exports.

3/ Less than a half million.

4/ Estimated.

Basic data but not estimates compiled from reports of the Internal Revenue Service and the Bureau of the Census.

Total consumer expenditure of cigars and cigarillos in 1959 is estimated at about \$610 million--5½ percent above 1958. The increase reflects the larger volume at a little lower overall unit price since most of the increase is indicated to be in the lower retail price brackets. Cigarillos are included in these lower retail price brackets.

Cigar and cigarillo output is expected to make a further gain in 1960 but probably not as much as from 1958 to 1959. Consumer incomes are expected to continue to increase. A very large proportion of total output is now utilizing the sheet binder instead of natural leaf binder. Many lower-priced, medium-priced and higher-priced brands have been adapted to the sheet binder. The savings in costs from the use of sheet binder has assisted manufacturers in holding cigar prices stable and in offering new medium and lower-priced lines, though cigars in these lines have tended to be smaller than the traditional full-size cigars.

The switch in cigars between two broad retail price groups in the last year or two is apparent from the following percentage breakdown of cigars distributed from domestic and Puerto Rican factories:

| <u>Period</u> | <u>8 cents or less (Percent)</u> | <u>Over 8 cents (Percent)</u> | <u>Total (Percent)</u> |
|------------------|--|---------------------------------------|----------------------------|
| 1956 | 53.2 | 46.8 | 100.0 |
| 1957 | 54.1 | 45.9 | 100.0 |
| 1958 | 57.8 | 42.2 | 100.0 |
| 1959 (Jan.-Oct.) | 61.3 | 38.7 | 100.0 |

Domestic and Puerto Rican factories make 96 percent of the cigars consumed by United States smokers including those overseas. Bonded manufacturing warehouses account for about 3½ percent and imported cigars the remaining one-half percent. According to fiscal 1959 data, more than nine-tenths of the bonded warehouse cigars retailed at over 8 cents each. Cuba is the source of about four-fifths of the cigars imported and over nine-tenths of the imported Cuban cigars retail at over 20 cents each. Most cigars from the Philippine Republic, the next ranking source of imported cigars, sell at 8 cents or less.

Cigars and cigarillos are taxed by the Federal Government according to the intended retail price. The rate of tax varies from a fourth of a cent on a cigar retailing at 2½ cents or less to two cents on a cigar selling at above 20 cents; there are five other specific rates for price groups between these outside ranges. During the 1959 fiscal year the Federal tax per cigar averaged three-fourths of a cent--approximately 8 percent of the overall average retail price for all cigars.

Fifteen States now tax cigars. Four of these (New York, Texas, Vermont and Washington) started taxing cigars in the last half of this year, and three, which already had a cigar tax, raised their rates. Thus since July 1, prices of cigars have been increased in 7 States which have about 22 percent of the adult population of the United States. Nine States tax cigars at specific rates according to retail price ranges and 6 States set rates at 15 to 25 percent of the wholesale price.

According to trade reports the new 15 percent State levy on wholesale prices of cigars in New York is having a significant impact. New York City is a particularly heavy cigar consumption center. Part of the reaction is a shift by consumer to lower priced cigars to offset the price increases brought about by the tax levy. It is still too early to judge the full effect of the tax-induced price increases on total cigar consumption.

Output and factory removals of cigarette-size cigars (weighing not more than 3 pounds per 1,000) have declined sharply from their high point early in 1959. Output this year is estimated at about 525 million but during August-October (most recent 3 months for which data are available) output was at an annual rate of only about 140 million. The 1954-57 average output of small cigars was 58 million. During July-October 64 percent of factory removals were taxable and 36 percent were tax exempt. The substantial proportion tax exempt indicates that foreign markets were a significant outlet for little cigars in recent months.

Smoking Tobacco

The 1959 production of smoking tobacco for pipes and "roll-your-own" cigarettes probably totals about 73 million pounds--4 percent less than in 1958 but 2 percent above 1957, when output was the lowest this century. Consumption of smoking tobacco in each of the first 3 quarters of 1959 was below that a year earlier, and in July-September was also below the level 2 years earlier. In October taxable removals of smoking tobacco were the smallest for that month ever recorded.

Use of tobacco for "roll-your-own" cigarettes is estimated to comprise roughly a fourth of tobacco for pipes and hand-rolled cigarettes. Through October, tax-paid cigarette papers were 3 percent less than in the comparable period of 1958, but otherwise the largest 10-month total since 1952. In addition, many cigarette papers are given away tax-free, but recent months data for these are not available. During fiscal year 1958-59, the number of tax-free papers was 17 percent above 1957-58; the total number of cigarette papers (tax-paid and tax-free) was 12 percent ahead of those a year earlier. Cigarette papers are tax-free when in packets of 25 or less which usually are given away with packaged tobacco. When in packets or books of more than 25, they are sold and subject to a Federal tax of one-half cent per 50 papers or fractional part. The Federal tax on smoking tobacco is 10 cents per pound. This tax is equal to about 6 percent of the retail price. In addition, according to a recent compilation 14 States also tax smoking tobacco.

With consumer incomes continuing high, appreciable increases in purchases of smoking tobacco are not likely in 1960. While some individuals may switch to smoking tobacco for economy reasons, experience indicates that many of them tend to resume their former mode of smoking because of convenience or for other reasons.

Exports of packaged smoking tobacco during January-October 1959 totaled 523,000 pounds--about a tenth less than a year earlier. Canada, accounting for around a fourth of the total, reduced takings by 34 percent. Numerous foreign outlets accounted for the remainder.

A sizable volume of manufactured bulk tobacco is reported in the Bureau of Census export statistics, though most of it is not covered in output statistics as reported by the Internal Revenue Service. This export category includes specially prepared cigarette tobacco, cut or granulated tobacco, partially processed blended tobacco, and shredded tobacco. These exports have risen sharply in recent years and in 1958 reached a high of 6.9 million pounds. This record was surpassed in 1959. During January-October, exports of bulk smoking tobacco totaled 7-1/2 million pounds--a fourth larger than in the comparable months of 1958. Consignments to Spain, accounting for two-fifths of the total, jumped nearly 80 percent above those in January-October 1958. Larger exports than a year earlier also went to Mexico, Haiti, and Bolivia. On the other hand, takings by Panama and Australia dropped by about a fourth, and there were small declines to Dominican Republic and Ecuador. Swiss takings were only a small fraction of those in the corresponding months of 1958. Significant shipments went to Italy, Philippine Republic and Viet Nam in contrast to none a year earlier.

Chewing Tobacco

The 1959 output of chewing tobacco probably totaled near 67 3/4 million pounds--2 percent less than in 1958 and a new low. A continuation of the long-term downward trend is expected in 1960. Modern attitudes and circumstances of employment and living generally tend to discourage the use of chewing tobacco. There are occupations, however, where hazards of fire, explosion or dust make chewing or snuff the only practicable forms of tobacco consumption.

Table 4.--Output of manufactured tobacco in the United States for specified periods

| Period | Smoking | Chewing | | | | | Snuff |
|----------------|----------|----------|----------|----------|----------|----------|----------|
| | | Plug | Twist | Fine-cut | Scrap | Total | |
| | | | | | | | |
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. |
| Average | | | | | | | |
| 1935-39 | 195.3 | 56.8 | 6.0 | 4.8 | 43.8 | 111.4 | 37.3 |
| 1940-44 | 176.2 | 54.8 | 6.0 | 4.6 | 47.9 | 113.3 | 40.7 |
| | | | | | | | |
| 1945 | 168.5 | 59.7 | 6.7 | 4.0 | 47.7 | 118.1 | 43.8 |
| 1946 | 106.4 | 51.8 | 5.8 | 3.8 | 46.1 | 107.5 | 39.4 |
| 1947 | 104.7 | 47.3 | 5.2 | 3.8 | 42.2 | 98.5 | 39.2 |
| 1948 | 107.6 | 45.3 | 5.6 | 3.2 | 42.1 | 96.2 | 40.8 |
| 1949 | 108.1 | 41.9 | 5.6 | 2.8 | 39.6 | 89.9 | 40.9 |
| | | | | | | | |
| 1950 | 107.7 | 40.3 | 5.5 | 2.7 | 39.0 | 87.5 | 40.0 |
| 1951 | 101.3 | 39.9 | 4.6 | 2.8 | 39.1 | 86.4 | 39.5 |
| 1952 | 96.8 | 39.1 | 4.8 | 2.8 | 38.2 | 84.9 | 38.8 |
| 1953 | 86.6 | 38.1 | 4.7 | 2.9 | 38.1 | 83.8 | 39.1 |
| 1954 | 83.7 | 36.9 | 4.9 | 2.9 | 36.6 | 81.3 | 38.5 |
| | | | | | | | |
| 1955 | 80.0 | 36.5 | 4.5 | 3.0 | 36.0 | 80.0 | 39.2 |
| 1956 | 71.5 | 33.0 | 4.3 | 2.9 | 35.5 | 75.7 | 37.7 |
| 1957 | 70.5 | 31.6 | 4.0 | 2.8 | 34.0 | 72.4 | 36.1 |
| 1958 | 76.0 | 29.6 | 3.8 | 2.9 | 33.0 | 69.3 | 34.8 |
| 1959 <u>1/</u> | 73.0 | 28.5 | 3.5 | 3.8 | 32.0 | 67.8 | 34.0 |
| | | | | | | | |

^{1/} Estimated.

Basic data but not the estimates compiled from reports of the Internal Revenue Service.

The major categories of chewing tobacco are scrap which mainly utilizes certain grades of the cigar binder types, and plug which mainly utilizes burley and dark air-cured tobacco. Two smaller categories of chewing tobacco are twist and fine-cut. Plug chewing and scrap each fell about 1 million pounds, or 4 percent and 3 percent, respectively. Twist declined by about 8 percent, but based on a recent jump in output, fine-cut rose to the highest level since the immediate postwar years. There may be some switching by snuff users to fine-cut chewing tobacco, some brands of which resemble snuff.

Chewing tobacco is subject to a Federal tax of 10 cents per pound. In addition, around a dozen States also now levy taxes on chewing tobacco.

Export markets take about 2 percent of total chewing tobacco output. Most of this is twist and plug. During the first 10 months of 1959, exports of chewing tobacco were 8 percent lower than in the corresponding period of 1958 and about a third lower than the comparable preceding 5-year average. Australia, the principal outlet, took about a fifth less than in January-October 1958. Moderately larger quantities than a year earlier went to the Philippine Republic and Panama.

Snuff

Production of snuff in 1959 is estimated at around 3⁴ million pounds--2 percent below 1958, and the least in over 40 years. Snuff is the principal domestic outlet for the fire-cured types; virtually the entire output is consumed domestically.

From the end of World War II until 1956, total consumption of snuff fluctuated within a relatively narrow range. In the past 4 years, however, consumption has fallen steadily, although the rate of decline slackened in 1959 compared with the preceding 3 years. In view of the slower rate of decline in 1959, snuff output in 1960 may not be much different than this year's.

A Federal tax of 10 cents a pound is levied on snuff. According to a recent compilation, 11 States also now tax this product.

Trade estimates of the number of snuff users in the United States range from 4 million to 6 million, although available evidence indicates the lower figure is more probable. Users of snuff are mostly in the South and Northwest and in occupations where smoking is hazardous or inconvenient.

EXPORTS OF UNMANUFACTURED TOBACCO FROM THE UNITED STATES 1/

The 1959 calendar year exports of tobacco are estimated at near 470 million pounds, declared weight (equivalent to about 525 million pounds, farm-sales weight)--2-1/2 percent below 1958. In the 1949-58 period, annual exports averaged 490 million pounds, ranging from a low of 396 million in 1952 to a high of 540 million in 1955.

In the first 10 months of 1959, exports of flue-cured--the principal export class--were 7 percent smaller than in the corresponding period a year ago and 14 percent less than the comparable 1953-57 average. Unusually large quantities of flue-cured were exported in September of this year, partly in anticipation of a possible strike by dock workers the following month. This was balanced by lower-than-usual shipments in October, following a work stoppage that lasted about a week.

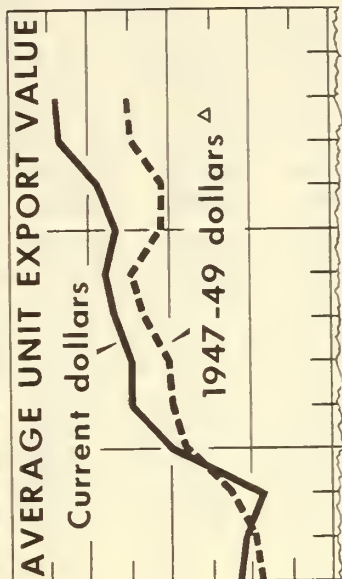
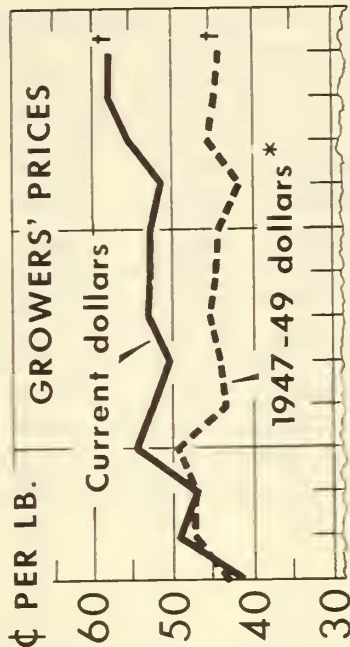
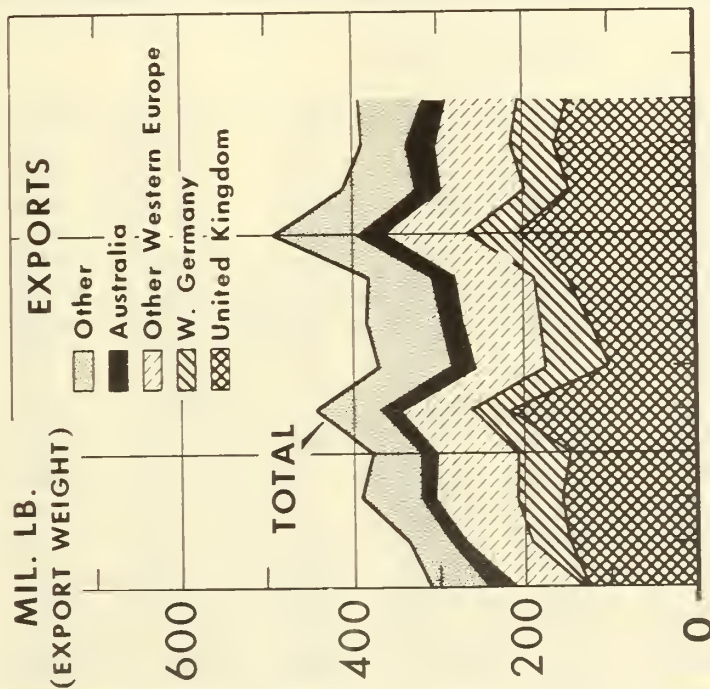
Shipments of flue-cured are usually heaviest in the months of August-December, after substantial quantities of the crop have been marketed. The average value per pound of flue-cured exported during August-October was 76.7 cents per pound, 1 cent higher than that a year ago.

The January-October exports of burley were down slightly from those in the comparable months of 1958. Exports of Kentucky-Tennessee fire-cured declined by a fifth, and of Virginia fire-cured, by about a tenth. Maryland exports in January-October were 23 percent larger than a year earlier. Exports of One Sucker were triple those of January-October 1958, but there was a drop of more than a fifth in Green River. Cigar filler and binder exports were larger than a year earlier, with the increase in binder due to a gain in the Wisconsin types; the Connecticut Valley types (Broadleaf and Havana Seed) were down appreciably from year-earlier levels. Shipments of cigar wrapper were smaller than in January-October 1958, attributable to a drop in Connecticut Valley shade-grown.

West European markets take approximately three-fourths of total U. S. tobacco exports. Expansion of economic activity in West Europe was renewed in 1959. Gold and dollar reserves of most West European countries have risen appreciably from the levels of a year earlier. By mid-1959, there were substantial increases in reserves of Austria, France, Italy, Netherlands and Sweden. German reserves at \$4.2 billion were 3 percent higher than a year earlier. Centrally held reserves of the United Kingdom at the end of November, \$3 billion, were 7 percent less than a year ago, mainly because of certain debt repayments, but were more than a third higher than the low level 2 years earlier. Reflecting her improved reserves position, the United Kingdom has removed most restrictions on imports from the dollar area, retaining them on tobacco. Some countries liberalized trade restrictions in the past year, but the barriers affecting U. S. tobacco remain.

1/ Quantities of tobacco in this section are stated in terms of export weight, which is less than the equivalent farm-sales weight.

FLUE-CURED TOBACCO EXPORTS, PRICES, AND UNIT VALUES



YEAR BEGINNING JULY

*CURRENT PRICE ADJUSTED BY INDEX OF PRICES PAID BY NORTH CAROLINA GROWERS.

Δ CURRENT VALUE ADJUSTED BY INDEX OF UNIT VALUE OF U. S. MERCHANDISE EXPORTS.

† PRELIMINARY

U. S. DEPARTMENT OF AGRICULTURE

NEG. 6451-59(12) AGRICULTURAL MARKETING SERVICE

Exports of flue-cured in 1958-59, at 392 million pounds (export weight), were slightly above those in 1957-58 but 5 percent below 1956-57. Takings by the United Kingdom were about a tenth less than in 1957-58, but exports to West Germany were a fifth larger. Less went to several other West European countries and Australia; more than a year earlier went to Japan, Viet Nam, New Zealand and Philippine Republic.

In the past 2 seasons, growers' prices were 10 percent above levels 2 and 3 years earlier, but when adjusted for changes in prices paid by growers, were up only slightly. In 1958-59, the average value per pound of flue-cured exports was 12 percent higher than in 1955-56, but when adjusted for changes in the unit value of all U. S. exports, was 7 percent higher.

Table 5.--United States exports of unmanufactured tobacco by types and to principal importing countries for specified periods

| Country and type | (Declared weight) | | | | | | |
|---------------------------------|--------------------|--------------------|-------------------|-------------------|-------------------|-------------------|----------------------------------|
| | Average 1947-51 | Average 1952-56 | 1957 | 1958 1/ | January-October | | |
| | | | | | 1958 1/ | 1959 1/ | 1959 as percentage of 1958 |
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Percent |
| Flue-cured | 388.1 | 403.0 | 417.7 | 398.7 | 309.0 | 287.3 | 93 |
| Burley | 32.9 | 28.5 | 20.5 | 28.8 | 23.8 | 23.5 | 99 |
| Maryland | 7.3 | 8.6 | 13.5 | 11.9 | 9.2 | 11.3 | 123 |
| Va. fire-cured and sun-cured | 6.0 | 4.4 | 5.3 | 4.6 | 4.0 | 3.6 | 90 |
| Ky. and Tenn. fire-cured | 24.6 | 21.6 | 22.0 | 19.7 | 17.5 | 14.1 | 81 |
| Green River | 1.7 | 1.9 | 1.6 | 1.2 | 1.0 | .8 | 80 |
| One Sucker | 3.1 | 1.5 | 2.6 | .9 | .6 | 1.9 | 317 |
| Black Fat, etc. | 4.7 | 4.3 | 4.5 | 4.9 | 4.0 | 3.8 | 95 |
| Cigar wrapper |) | 3.7 | 4.5 | 4.7 | 4.3 | 3.6 | 84 |
| Cigar binder |) 9.8 | 2.5 | 3.9 | 2.0 | 1.6 | 2.8 | 175 |
| Cigar filler |) | .5 | .1 | .6 | .2 | 1.0 | 500 |
| Perique | .1 | .1 | .1 | .1 | .1 | .1 | 100 |
| Stems, trimmings, and scrap | 8.1 | 3.3 | 4.7 | 4.2 | 3.4 | 4.6 | 135 |
| Total | 486.4 | 483.9 | 501.0 | 482.3 | 378.7 | 358.4 | 95 |
| Country of destination | | | | | | | |
| United Kingdom | 177.8 | 144.9 | 166.5 | 160.4 | 126.4 | 113.4 | 90 |
| France | 9.0 | 7.7 | 7.5 | 8.1 | 6.5 | 4.7 | 72 |
| Belgium | 22.7 | 17.4 | 16.3 | 14.5 | 11.7 | 13.7 | 117 |
| Netherlands | 33.9 | 35.3 | 31.7 | 22.8 | 18.9 | 20.6 | 109 |
| Germany, W. and E. | 49.1 | 64.8 | 68.9 | 81.7 | 68.8 | 54.0 | 78 |
| Portugal | 8.7 | 6.8 | 5.8 | 7.1 | 7.0 | 4.9 | 70 |
| Denmark | 11.1 | 11.1 | 14.0 | 11.9 | 7.9 | 10.0 | 127 |
| Ireland | 17.7 | 13.9 | 9.8 | 13.5 | 10.8 | 6.7 | 62 |
| Switzerland | 12.7 | 11.8 | 14.2 | 10.4 | 7.5 | 7.9 | 105 |
| Norway | 7.9 | 7.8 | 7.4 | 7.5 | 6.0 | 5.6 | 93 |
| Sweden | 12.4 | 11.7 | 14.8 | 11.6 | 9.3 | 6.3 | 68 |
| Italy | 7.0 | 4.7 | 4.8 | 7.2 | 5.5 | 3.7 | 67 |
| Thailand | 3.0 | 4.4 | 13.5 | 9.2 | 8.8 | 8.8 | 100 |
| Australia | 20.3 | 26.7 | 38.2 | 26.3 | 14.9 | 16.2 | 109 |
| India |) | 4.4 | 4.3 | 3.0 | 2.2 | 2.0 | 91 |
| Pakistan |) 8.1 | | 2.9 | .3 | .2 | .7 | 350 |
| New Zealand | 5.8 | 6.5 | 6.3 | 6.3 | 5.4 | 5.9 | 109 |
| Philippine Rep. | 7.6 | 18.8 | .1 | 5.0 | 4.0 | 3.0 | 75 |
| Indonesia | 6.5 | 12.9 | 11.5 | 1.7 | 1.1 | 2.0 | 182 |
| Japan | .4 | 9.4 | 3.6 | 11.2 | 3.0 | 4.2 | 140 |
| Other countries | 64.7 | 62.9 | 58.9 | 62.6 | 52.8 | 64.1 | 121 |
| Total | 486.4 | 483.9 | 501.0 | 482.3 | 378.7 | 358.4 | 95 |

1/ Preliminary.

Compiled from publications and records of the Bureau of the Census.

In the year ending June 30, 1960 total exports of tobacco may be near the 473 million pounds shipped in 1958-59.

The U. S. is the world's largest producer and exporter of tobacco. In world markets, U. S. flue-cured meets competition from tobacco from the Federation of Rhodesia and Nyasaland, Canada, and India, all of which produce and export substantial quantities of flue-cured. Turkey and Greece--which grow almost entirely oriental tobacco--are also important producing and exporting countries.

The 1959 flue-cured crop in Rhodesia-Nyasaland totaled a record 195 million pounds--a fourth larger than the crop of 1958. In the main producing area of Rhodesia, acreage was up by 4 percent, while the average yield per acre rose by a fifth to 886 pounds. The general quality of the crop was lower than in 1958. Prices averaged the equivalent of 40 U. S. cents per pound, compared with 42.2 cents in 1958. Virtually the entire crop--193 million pounds--was sold on the Salisbury auctions, which this year extended from March 17 to October 1. Quantities of Rhodesian flue-cured purchased by the United Kingdom and Australia from 1959 offerings, with earlier year comparisons are as follows:

| <u>Year</u> | <u>Purchased by United Kingdom</u> | <u>Purchased by Australia</u> |
|-------------|--|-----------------------------------|
| | <u>Million pounds</u> | <u>Million pounds</u> |
| 1955 | 68 | 10 |
| 1956 | 88 | 9 |
| 1957 | 82 | 9 |
| 1958 | 78 | 11 |
| 1959 | 96 | 11 |

With sharply increased tobacco production, Rhodesia is stepping up efforts to expand her markets, looking to countries outside the Commonwealth area.

In the first 9 months of 1959, the Federation exported 139 million pounds of tobacco--21 percent more than a year ago. Flue-cured comprised nearly 85 percent of this year's shipments and dark fire-cured most of the remainder. The United Kingdom, accounting for 56 percent of the Federation's tobacco exports, took a sixth more than in the comparable period of 1958. Other Commonwealth destinations together received 28 percent more, attributable to increased takings by Australia, Union of South Africa, Hong Kong, Malaya and Singapore, and Ghana. Substantial quantities of Rhodesian tobacco went to West Germany, Netherlands and Belgium, all of which took more than a year earlier. Lesser quantities went to Denmark, Norway, Sweden, Switzerland, Portugal and France, all of which except Denmark increased takings over those a year ago.

Table 6 .--United Kingdom tobacco: Imports, stocks, clearances, and exports for specified periods

| Period | Imports <u>1/</u> | | | Gross clearances from bond <u>3/</u> | | | | Exports of manu- factured tobacco | Re-exports of unmanu- factured tobacco |
|-----------|-------------------|------------|------------|---|-------------|------------|------------|--|---|
| | From : | | | Non- : | | | | | |
| | Com- : | | | Prefer- : | | | | | |
| | U. S. : | mon : | Stocks | Non- | Prefer- | Total | | | |
| | <u>2/</u> : | coun- : | Dec. 31 | prefer- | ential | Total | | | |
| | <u>2/</u> : | tries : | | <u>2/</u> : | <u>2/</u> : | | | | |
| | Mil. | Mil. | Mil. | Mil. | Mil. | Mil. | Mil. | Mil. | |
| | <u>lb.</u> | <u>lb.</u> | <u>lb.</u> | <u>lb.</u> | <u>lb.</u> | <u>lb.</u> | <u>lb.</u> | <u>lb.</u> | |
| Average | | | | | | | | | |
| 1946 | 366 | 62 | 433 | 383 | 261 | 61 | 322 | 55 | 7 |
| 1947 | 201 | 82 | 296 | 384 | 235 | 57 | 292 | 52 | 1 |
| 1948 | 172 | 97 | 281 | 390 | 204 | 67 | 271 | 45 | 1 |
| 1949 | 154 | 119 | 302 | 419 | 190 | 81 | 271 | 47 | 2 |
| 1950 | 144 | 146 | 306 | 445 | 180 | 91 | 271 | 43 | 4 |
| 1951 | 212 | 131 | 355 | 498 | 183 | 104 | 287 | 51 | 7 |
| 1952 | 67 | 143 | 224 | 430 | 172 | 108 | 280 | 47 | 12 |
| 1953 | 174 | 127 | 316 | 452 | 167 | 116 | 283 | 45 | 9 |
| 1954 | 160 | 139 | 312 | 468 | 168 | 122 | 290 | 41 | 4 |
| 1955 | 179 | 149 | 344 | 507 | 173 | 125 | 298 | 44 | 4 |
| 1956 | 160 | 146 | 318 | 523 | 173 | 127 | 300 | 45 | 3 |
| 1957 | 168 | 141 | 319 | 532 | 170 | 135 | 305 | 41 | 3 |
| 1958 | 164 | 145 | 316 | 534 | 172 | 138 | 310 | 41 | 2 |
| Jan.-Oct. | | | | | | | | | |
| 1955 | 128 | 132 | 272 | 5/454 | 6/127 | 6/91 | 6/218 | 37 | 4 |
| 1956 | 118 | 116 | 243 | 5/471 | 6/126 | 6/92 | 6/218 | 36 | 2 |
| 1957 | 130 | 128 | 265 | 5/495 | 6/126 | 6/101 | 6/227 | 35 | 2 |
| 1958 | 115 | 131 | 253 | 5/495 | 6/130 | 6/104 | 6/234 | 34 | 1 |
| 1959 | 99 | 141 | 242 | 5/480 | 6/128 | 6/106 | 6/234 | 28 | 2 |

1/ Unmanufactured tobacco.

2/ Since 1946 the full duty rate on tobacco from the United States and other nonpreferential areas has been about 3 percent above the preferential rate on tobacco from Commonwealth areas. In the prewar period, the full duty rate was over 25 percent above the preferential rate.

3/ Largely withdrawals from manufacturers for home use and export.

4/ Subject to revision.

5/ September 30.

6/ January-September.

Compiled from the Annual Statement of Trade and Accounts Relating to Trade and Navigation of the United Kingdom.

Canada's 1959 flue-cured crop is estimated at 140 million pounds -- approximately a fourth smaller than the previous year's record crop. In Ontario, where most of Canada's flue-cured is grown, acreage was down from last year, and the crop was damaged by hail and frost. Sales under the Dutch clock auction system began in mid-November, and through December 10, 22.8 million pounds had been sold at an average price equivalent to 58.3 U. S. cents per pound. This price is approximately a tenth higher than in the comparable period a year ago. Exports of unmanufactured tobacco (mostly flue-cured) in the first 8 months of 1959 were 34 million pounds--about 30 percent more than in the comparable period of a year ago. Consignments to the United Kingdom--principal foreign market for Canadian tobacco--rose by 29 percent. Significant quantities were shipped to West Germany and Portugal, and lesser quantities to Netherlands and Belgium. Exports during most of 1960 will probably be considerably lower than year-earlier levels because of the reduced 1959 crop.

The 1959 flue-cured crop in India is placed at around 121 million pounds--15 percent more than produced in 1958. Ranking markets for the 90 million pounds of flue-cured exported by India in 1958 were the United Kingdom (which took about 45 percent of the total), China, Soviet Union, Netherlands, Hong Kong, Belgium, French West Africa, Egypt, Singapore and West Germany.

In Turkey, the 1959 production of tobacco is currently estimated at a record 279 million pounds--more than a fifth above 1958 and about 6 percent above the previous record crop of 1957. During January-August 1959, Turkey's tobacco exports at 107 million pounds were 16 percent smaller than a year earlier. The United States accounted for 45 percent of the total and took around a tenth more than a year earlier. Other major outlets were West Germany (which reduced takings by a fifth), Poland, Czechoslovakia, East Germany, Hungary and France (which cut takings by nearly a half).

Greek production of oriental tobacco in 1959 is now estimated at about 167 million pounds--a tenth below 1958 and the smallest since 1954. Quality of the crop reportedly varies considerably, according to locality where grown. Exports in January-September 1959 totaled 50 million pounds, 5 percent more than a year earlier. The ranking outlet, West Germany, took over a fifth more than a year earlier, but exports to the United States, second ranking outlet, dropped by nearly 40 percent. Other major markets for Greek tobacco were Italy, Soviet Union, France, Finland and Austria.

UNITED STATES IMPORTS AND STOCKS OF FOREIGN GROWN TOBACCO 2/

U. S. imports of foreign grown tobacco during the first 10 months of 1959 were at a record rate. Total receipts were 10 percent above those in the comparable months of 1958, with the increase mainly due to larger imports of cigarette leaf and scrap (short filler) for cigars.

2/ Imports of tobacco for consumption are on a declared-weight basis and stocks are on an unstemmed-equivalent basis.

Table 7.--United States imports for consumption of unmanufactured tobacco, from principal supplying countries, for specified periods

| (Declared weight) | | | | | | | |
|--|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Classification and country of origin | January-October | | | | | | |
| | Average | Average | 1957 | 1958 | 1958 | 1959 | 1959 as per- |
| | 1947-51 | 1952-56 | | <u>1/</u> | <u>1/</u> | <u>1/</u> | centage of 1958 |
| | Mil. <u>lb.</u> | Mil. <u>lb.</u> | Mil. <u>lb.</u> | Mil. <u>lb.</u> | Mil. <u>lb.</u> | Mil. <u>lb.</u> | Percent |
| Cigarette leaf | | | | | | | |
| Unstemmed: | | | | | | | |
| Turkey | 46.9 | 57.4 | 60.0 | 65.1 | 55.1 | 58.9 | 107 |
| Greece | 9.3 | 16.2 | 23.3 | 28.5 | 24.1 | 26.8 | 111 |
| Syria | 3.8 | 2.8 | 1.2 | 1.1 | .2 | .8 | 400 |
| Italy | .2 | 1.4 | 1.5 | 1.7 | 1.5 | 1.5 | 100 |
| Cyprus | .0 | .3 | .5 | 1.2 | 1.0 | .7 | 70 |
| Yugoslavia | .4 | 1.8 | 3.6 | 4.0 | 3.4 | 3.8 | 112 |
| Total <u>2/</u> | 67.2 | 81.0 | 91.2 | 104.6 | 88.4 | 94.7 | 107 |
| Cigar leaf (filler) | | | | | | | |
| Cuba: | | | | | | | |
| Stemmed | 12.1 | 9.3 | 8.8 | 9.0 | 7.6 | 7.8 | 103 |
| Unstemmed | 4.4 | 4.4 | 3.0 | 3.1 | 2.7 | 3.1 | 115 |
| Philippines, Rep.: | | | | | | | |
| Stemmed | .1 | .6 | .2 | .3 | .3 | .2 | 67 |
| Unstemmed | .2 | .1 | 0 | .1 | .1 | <u>3/</u> | --- |
| Total <u>2/</u> | 16.8 | 14.5 | 12.2 | 12.7 | 10.9 | 11.1 | 102 |
| Scrap: | | | | | | | |
| Cuba | 5.2 | 9.5 | 12.3 | 13.8 | 11.2 | 13.3 | 119 |
| Philippines, Rep. | .4 | 2.6 | 6.1 | 5.5 | 4.4 | 6.6 | 150 |
| Total <u>2/</u> | 5.6 | 12.1 | 18.4 | 19.5 | 15.8 | 20.7 | 131 |
| Cigar wrapper (unst.) | | | | | | | |
| Indonesia | .8 | .4 | .1 | .1 | .1 | <u>3/</u> | --- |
| Cuba | .3 | .5 | .6 | .5 | .4 | .5 | 125 |
| Total <u>2/</u> | 1.1 | .9 | .7 | .6 | .5 | .5 | 100 |
| Total imports <u>4/</u> | 91.5 | 109.4 | 124.1 | 138.5 | 116.3 | 128.4 | 110 |

1/ Preliminary.

2/ Includes relatively small quantities from other countries not separately listed except in 1947-51, when sizable amounts of cigarette leaf entered from U.S.S.R., Bulgaria and Southern Rhodesia.

3/ Less than 50,000 pounds.

4/ Includes stems not cut, ground, or pulverized.

Compiled from publications and records of the Bureau of the Census.

Imports of cigarette leaf were up by 7 percent. Turkey and Greece--our principal suppliers--furnished 7 percent and 11 percent, respectively, more than a year earlier. Stocks of foreign grown cigarette and smoking tobacco in this country on October 1 totaled 209 million pounds--slightly below the previous high for that date recorded a year earlier.

The major portion of non-cigarette tobacco imports consists of cigar filler and scrap, which are principally furnished by Cuba. Imports of stemmed and unstemmed filler from Cuba increased moderately, while those of Cuban scrap rose by nearly a fifth. On October 1, stocks of Cuban tobacco at 29 million pounds were over 10 million higher than a year ago and the most for that date since 1947.

Imports of Philippine scrap in January-October increased by 50 percent over those in the like period of 1958. October 1 stocks were 9.3 million pounds--a tenth more than a year ago and the largest October 1 stocks on record.

More cigar wrapper was received from Cuba but imports of wrapper from Indonesia, which have dwindled in postwar years, were negligible. Stocks of Sumatra and Java tobacco in the U. S. were only 23,000 pounds on October 1; a year ago they were 104,000 pounds. Before the war, when Netherlands Indies (now Indonesia) was our principal source of imported cigar wrapper, U. S. stocks of Sumatra and Java wrapper were substantial, October 1 holdings ranging from about 2 to 5 million pounds in the 1937-41 period.

OUTLOOK AND SITUATION FOR TOBACCO LEAF

Flue-cured, Types 11-14

1960 Acreage Allotment

Acreage available for allotment in 1960 totals 715,110 acres, as was announced on November 23. For practically all flue-cured farms the allotments remain the same as in each of the past 3 years. The slightly larger total than last year includes the reserve for establishing allotments for farms that have not grown flue-cured during the past 5 years, for correcting errors, and for adjusting inequities.

The Department also announced that the discount variety program on flue-cured tobacco will continue in effect on the 1960 crop.

Table 8.--Flue-cured tobacco: Average price per pound and percentage comparisons by Belt, 1947-59

| Marketing Season | Old Belt type 11 (a) | Middle Belt type 11 (b) | Eastern N. C. Belt type 12 | Border Belt type 13 | Ga.-Fla. Belt type 14 | All Belts |
|---|----------------------|-------------------------|----------------------------|---------------------|-----------------------|-----------------|
| | Cents per pound | Cents per pound | Cents per pound | Cents per pound | Cents per pound | Cents per pound |
| 1947 | 38.1 | 42.2 | 43.0 | 41.9 | 37.8 | 41.1 |
| 1948 | 49.2 | 50.1 | 49.3 | 50.5 | 47.2 | 49.4 |
| 1949 | 45.5 | 47.7 | 48.8 | 48.9 | 40.1 | 46.9 |
| 1950 | 53.4 | 56.2 | 56.5 | 55.4 | 48.1 | 54.6 |
| 1951 | 50.4 | 53.8 | 55.1 | 51.9 | 46.3 | 52.2 |
| 1952 | 48.4 | 49.4 | 50.5 | 51.9 | 49.2 | 50.1 |
| 1953 | 42.0 | 47.0 | 57.1 | 56.7 | 51.1 | 52.5 |
| 1954 | 52.0 | 52.3 | 54.7 | 51.3 | 46.5 | 52.1 |
| 1955 | 53.8 | 52.4 | 52.3 | 53.7 | 46.5 | 52.2 |
| 1956 | 49.9 | 51.9 | 51.5 | 53.2 | 48.0 | 51.1 |
| 1957 | 52.3 | 53.1 | 54.3 | 59.1 | 55.9 | 55.0 |
| 1958 | 57.2 | 57.1 | 57.1 | 59.6 | 57.1 | 57.7 |
| 1959 1/ | 53.2 | 56.4 | 57.9 | 62.1 | 57.8 | 57.7 |
| Price for each type as percentage of price for all types combined | | | | | | |
| | Percent | Percent | Percent | Percent | Percent | Percent |
| 1947 | 92.7 | 102.7 | 104.6 | 101.9 | 92.0 | 100.0 |
| 1948 | 99.6 | 101.4 | 99.8 | 102.2 | 95.5 | 100.0 |
| 1949 | 97.0 | 101.7 | 104.1 | 104.3 | 85.5 | 100.0 |
| 1950 | 97.8 | 102.9 | 103.5 | 101.5 | 88.1 | 100.0 |
| 1951 | 96.6 | 103.1 | 105.6 | 99.4 | 88.7 | 100.0 |
| 1952 | 96.6 | 98.6 | 100.8 | 103.6 | 98.2 | 100.0 |
| 1953 | 80.0 | 89.5 | 108.8 | 108.0 | 97.3 | 100.0 |
| 1954 | 99.8 | 100.4 | 105.0 | 98.3 | 89.3 | 100.0 |
| 1955 | 103.1 | 100.4 | 100.2 | 102.9 | 89.1 | 100.0 |
| 1956 | 97.7 | 101.6 | 100.8 | 104.1 | 93.9 | 100.0 |
| 1957 | 95.1 | 96.4 | 98.7 | 107.5 | 101.6 | 100.0 |
| 1958 | 99.1 | 99.0 | 99.0 | 103.1 | 99.1 | 100.0 |
| 1959 1/ | 92.1 | 97.7 | 100.3 | 107.6 | 100.1 | 100.0 |

1/ Preliminary.

Table 9.--Flue-cured tobacco: Volume of gross sales (includes resales) and percentage distribution by belt, 1947-59

| Marketing season | Old Belt type 11 (a) | Middle Belt type 11 (b) | Eastern N. C. Belt type 12 | Border Belt type 13 | Ga.-Fla. Belt type 14 | All belts |
|---------------------|-------------------------------|----------------------------------|-------------------------------------|---------------------------|-----------------------------|-------------------|
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| 1947 | 278 | 176 | 483 | 299 | 171 | 1,407 |
| 1948 | 256 | 157 | 392 | 258 | 134 | 1,197 |
| 1949 | 243 | 137 | 406 | 283 | 155 | 1,224 |
| 1950 | 315 | 171 | 448 | 302 | 142 | 1,378 |
| 1951 | 312 | 187 | 527 | 357 | 192 | 1,575 |
| 1952 | 328 | 177 | 488 | 333 | 180 | 1,506 |
| 1953 | 254 | 138 | 480 | 348 | 192 | 1,412 |
| 1954 | 288 | 161 | 522 | 309 | 288 | 1,468 |
| 1955 | 311 | 170 | 528 | 371 | 213 | 1,593 |
| 1956 | 333 | 179 | 508 | 333 | 183 | 1,536 |
| 1957 | 235 | 124 | 353 | 254 | 120 | 1,087 |
| 1958 | 250 | 137 | 401 | 263 | 134 | 1,185 |
| 1959 ^{1/} | 250 | 136 | 358 | 278 | 161 | 1,183 |
| Percentage of total | | | | | | |
| | Percent | Percent | Percent | Percent | Percent | Percent |
| 1947 | 19.8 | 12.5 | 34.3 | 21.2 | 12.2 | 100.0 |
| 1948 | 21.4 | 13.1 | 32.7 | 21.6 | 11.2 | 100.0 |
| 1949 | 19.8 | 11.2 | 33.2 | 23.1 | 12.7 | 100.0 |
| 1950 | 22.9 | 12.4 | 32.5 | 21.9 | 10.3 | 100.0 |
| 1951 | 19.8 | 11.9 | 33.4 | 22.7 | 12.2 | 100.0 |
| 1952 | 21.8 | 11.8 | 32.4 | 22.1 | 11.9 | 100.0 |
| 1953 | 18.0 | 9.8 | 34.0 | 24.6 | 13.6 | 100.0 |
| 1954 | 19.6 | 11.0 | 35.6 | 21.0 | 12.8 | 100.0 |
| 1955 | 19.5 | 10.7 | 33.1 | 23.3 | 13.4 | 100.0 |
| 1956 | 21.7 | 11.6 | 33.1 | 21.7 | 11.9 | 100.0 |
| 1957 | 21.6 | 11.4 | 32.5 | 23.4 | 11.1 | 100.0 |
| 1958 | 21.1 | 11.6 | 33.8 | 22.2 | 11.3 | 100.0 |
| 1959 | 21.1 | 11.5 | 30.3 | 23.5 | 13.6 | 100.0 |

^{1/} Preliminary.

Table 10.--Flue-cured Tobacco: Receipts under government loan and percentage distribution by Belt, 1947-59

| Marketing Season | Old Belt type 11 (a) | Middle Belt type 11 (b) | Eastern N. C. Belt type 12 | Border Belt type 13 | Ga.-Fla. Belt type 14 | All Belts |
|-------------------------|----------------------|-------------------------|----------------------------|---------------------|-----------------------|----------------|
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| 1947 | 90.6 | 27.8 | 45.9 | 42.8 | 25.2 | 232.3 |
| 1948 | 47.0 | 15.8 | 21.3 | 17.3 | 4.7 | 106.1 |
| 1949 | 30.8 | 8.3 | 17.3 | 26.7 | 20.4 | 103.5 |
| 1950 | 35.6 | 12.3 | 17.9 | 6.7 | 5.1 | 77.6 |
| 1951 | 44.9 | 15.9 | 28.5 | 35.3 | 17.1 | 142.2 |
| 1952 | 61.1 | 19.0 | 55.4 | 23.0 | 6.5 | 165.0 |
| 1953 | 96.3 | 22.6 | 15.6 | 10.8 | 5.6 | 151.4 |
| 1954 | 40.7 | 15.8 | 38.8 | 26.6 | 8.3 | 130.2 |
| 1955 | 30.7 | 23.0 | 124.9 | 89.1 | 31.2 | 298.9 |
| 1956 | 64.3 | 50.6 | 128.1 | 62.8 | 13.6 | 319.9 |
| 1957 | 58.2 | 18.2 | 21.4 | 8.9 | 1.1 | 107.8 |
| 1958 | 41.2 | 15.7 | 50.0 | 35.5 | 2.4 | 144.8 |
| 1959 ^{1/} | 27.6 | 7.2 | 7.6 | 11.3 | 1.8 | 55.5 |
| Percentage distribution | | | | | | |
| | Percent | Percent | Percent | Percent | Percent | Percent |
| 1947 | 39.0 | 12.0 | 19.8 | 18.4 | 10.8 | 100.0 |
| 1948 | 44.3 | 14.9 | 20.1 | 16.3 | 4.4 | 100.0 |
| 1949 | 29.3 | 8.0 | 16.7 | 25.8 | 19.7 | 100.0 |
| 1950 | 45.9 | 15.3 | 23.1 | 8.6 | 6.6 | 100.0 |
| 1951 | 36.1 | 11.2 | 20.0 | 25.2 | 12.0 | 100.0 |
| 1952 | 37.0 | 11.5 | 33.6 | 14.0 | 3.9 | 100.0 |
| 1953 | 64.0 | 14.9 | 10.3 | 7.1 | 3.7 | 100.0 |
| 1954 | 31.3 | 12.1 | 29.8 | 20.4 | 6.4 | 100.0 |
| 1955 | 10.3 | 7.7 | 41.3 | 29.8 | 10.4 | 100.0 |
| 1956 | 20.3 | 15.8 | 40.0 | 19.6 | 4.3 | 100.0 |
| 1957 | 54.0 | 16.9 | 19.9 | 3.2 | 1.0 | 100.0 |
| 1958 | 28.5 | 10.3 | 34.5 | 24.5 | 1.7 | 100.0 |
| 1959 | 49.7 | 13.0 | 13.7 | 20.4 | 3.2 | 100.0 |

^{1/} Preliminary.

Prices

Under present legislation, the 1960 flue-cured crop must be supported at 90 percent of parity. The adjusted base price ^{3/}for calculating the flue-cured parity prices during 1960 will be higher than that used to determine the 1959 parities. If the parity index (prices paid by farmers including interest, taxes and wage rates) stays near its current level, the parity price for flue-cured in 1960 may be 2 or 3 percent higher than it was when the 1959 support level was set.

Marketings of the 1959 crop were completed by December 11. The season average price for gross sales (which include resales) was 57.7 cents--the same as last season's record high. In three of the five Belts average prices set new record highs.

In the Georgia-Florida Belt markets (which closed August 21) the gross volume was 20 percent greater than in 1958, and the average price exceeded that of the previous season by 1 percent to set a new high.

In the Border Belt markets (which closed October 1) the gross volume was 6 percent greater than in 1958, and the average price rose ⁴ percent and also set a new high.

In the Eastern Belt markets (which closed November 5) the gross volume dropped 11 percent below a year earlier in contrast to the other Belts. Except for 1957 this was the smallest volume since 1948. The season average price was nearly $1\frac{1}{2}$ percent above 1958 and above any previous year.

In the Middle Belt markets (which closed November 17) the gross volume almost equaled that of a year earlier, but the average price was about $1\frac{1}{4}$ percent below 1958 when it was a record high.

In the Old Belt markets (which closed December 11) the gross volume was the same as a year earlier. The season average price was down nearly 7 percent from 1958, but third highest on record.

Flue-cured tobacco placed under Government loan in the 1959 season totaled $55\frac{1}{2}$ million pounds, 5 percent of the total crop. This was in marked contrast with 1958 when 145 million pounds or $13\frac{1}{2}$ percent of the crop went under loan. Loan receipts in 1959 were the lowest since the present loan program has been in operation. In 11 of the 13 years preceding 1959, quantities placed under loan ranged from 103 million to 320 million pounds. The pro-

^{3/} The adjusted base price will be determined as follows:

(1) The average price of flue-cured in the past 10 seasons (1950-59) will be calculated. (When applicable an allowance is made for supplemental payments resulting from price support operations.)

(2) The 10 year flue-cured price average will be divided by the average of the Index of Prices Received by Farmers for all commodities in the same 10 years -- 1950-59. (Adjustments are made to include an allowance for unredeemed loans and other supplemental price support operations.) The result obtained by dividing will be the adjusted base price.

portions of 1959 market deliveries going under loan were smallest in the Georgia-Florida and Eastern Belts; the proportions were somewhat larger in the Border and Middle Belts and largest in the Old Belt.

Supplies

The 1959-60 total supply of flue-cured is 3,289 million pounds, down 3 percent from a year earlier and 11 percent from the peak of 3 years earlier. The 1959 crop was almost the same total size as 1958 although varying by areas; the increases in the South Carolina and Georgia-Florida areas largely offset the substantial decrease in the Eastern Carolina area. Acreage harvested of each of the flue-cured types was larger than a year earlier but yields per acre except in the South Carolina-Border North Carolina area were below the record 1958 averages. The sharpest decline was in the Eastern North Carolina area where yields averaged almost 15 percent below the record high of 1958.

Carryover of flue-cured on July 1, 1960 will be reduced from the July 1, 1959 level and may total about 2,100 million pounds. The 1960 allotted acreage is practically the same as in 1959. If yields per acre are equal to the 1957-59 average, a crop of approximately 1,100 million would be grown. In this case, the 1960-61 flue-cured supply--production plus carryover--would total about 3,200 million pounds. This would be 3 percent below the current year's supply and about 2.7 times the disappearance expected this marketing year. When supplies were at their peak in 1956-57 they were over 3.1 times disappearance.

Domestic Use and Exports

Domestic use of flue-cured stayed about unchanged in 1958-59, after making a sizable gain from 1956-57 to 1957-58. The 1959-60 domestic utilization is expected to exceed the 736 million pounds of last year but the percentage increase seems likely to be less than the unit output of cigarettes.

Exports of flue-cured in 1959-60 are expected to be fairly close to the 443 million pound level of 1958-59. Exports in the first third of the 1959-60 marketing year (July-October 1959) totaled 200 million pounds (farm-sales weight)--7 percent less than in the same months a year earlier. The work stoppage on the docks for about a week in October probably reduced that month's shipments since the reported figure was below what otherwise would have been expected. During July-October 1959, the top ranking importer, the United Kingdom, took 5 percent less than a year earlier. The biggest decrease from a year earlier in the July-October period was the 32 percent drop in shipments to West Germany, the second ranking foreign outlet. The October figure for exports to Germany was particularly low. Australia, third ranking outlet, took 18 percent less than a year earlier but Netherlands, fourth ranking outlet, took 58 percent more. Considerably less flue-cured went to Ireland and a little less to Denmark and Belgium than in July-October 1958, but there was a sharp increase to Sweden. Spain got a sizable amount in contrast to none in the same months of 1958. But shipments to Finland, Portugal, Switzerland, Italy,

Table 11.—Flue-cured tobacco, types 11-14: Domestic supplies, disappearance, season average price, and price support operations for specified periods

[illegible]

1/ Year beginning July 1. 2/ Subject to revision. 3/ As of applicable date when support level was computed. 4/ Actual loan stocks on a packed-weight basis average about 11 percent less than these farm-sales weight figures. 5/ An additional 78.4 million pounds under option to British manufacturers were pledged for CCC loans, but were purchased and shipped by mid-1953. 6/ Includes quantities that went under loan since the November 30 report. 7/ Approximately 35 million pounds included in this total have been sold.

*Auction market average for gross sales which include resales.

New Zealand, Egypt, Philippine Republic and Taiwan were below those of a year earlier. None was reported as going to France, Austria, Japan and Viet Nam in July-October 1959 in contrast to significant quantities in the same months of 1958. Countries that took more than a year earlier included Uruguay, Norway, Indonesia, Thailand, Pakistan, Hong Kong and Mexico.

Burley, Type 31

Prices

Burley auction markets began November 23, the earliest opening date on record. By December 18--when auctions closed for the holidays until January 4--gross sales totaled 469 million pounds, averaging 60.7 cents per pound. This price average is 5.8 cents or 9 percent lower than in the comparable period of last season. Approximately 90 percent of the crop had been sold on the 61 markets by December 18--the largest pre-Christmas sales on record. Last season the comparable figure was 83 percent. Since 1954, burley marketings have been four-fifths, or more, completed by the holiday shutdowns, a far larger proportion than in previous years.

Compared with a year ago, general quality of offerings has been lower. In general, prices of large-volume light- and medium-bodied grades were little changed from year-earlier levels, but prices of heavy-bodied grades were 2 to 13 cents a pound lower. Price spreads among grades generally have been wider than the exceptionally narrow margins of 1958 and 1956. But even though price spreads this season have increased, they are still considerably smaller than 5 years ago. This is illustrated by considering the differences between the price of burley in C4F grade (for years one of the major cigarette grades) and prices of selected other grades, as shown below:

| | <u>1954</u> | <u>1955</u> | <u>1956</u> | <u>1957</u> | <u>1958</u> | <u>1959 through December 18</u> |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|
| | <u>Cents per lb.</u> | <u>Cents per lb.</u> | <u>Cents per lb.</u> | <u>Cents per lb.</u> | <u>Cents per lb.</u> | <u>Cents per lb.</u> |
| Average price of C4F | 64 | 63 | 66 | 67 | 70 | 70 |
| Price spread between between C4F and: | | | | | | |
| | | | <u>Cents per pound</u> | <u>lower</u> | <u>than</u> | <u>C4F</u> |
| X4F | 2 | 1 | 1 | 1 | 1 | 0 |
| C4R | 8 | 3 | 1 | 3 | 2 | 2 |
| B4F | 12 | 4 | 1 | 4 | 2 | 2 |
| B4FR | 21 | 7 | 1 | 7 | 3 | 6 |
| B4R | 31 | 10 | 1 | 10 | 4 | 13 |
| T4R | 35 | 14 | 2 | 13 | 7 | 18 |
| N1G | 49 | 28 | 14 | 29 | 20 | 33 |

The Government support level for 1959 burley is 57.2 cents per pound--1.8 cents higher than for 1958 and $5\frac{1}{2}$ cents higher than for 1957. This amounts to an increase of about $10\frac{1}{2}$ percent in 2 years. However, deliveries for Government loan have been relatively small thus far this season as they have been in each of the last 3 seasons. Through December 18, only about 11 million pounds or about $2\frac{1}{2}$ percent of deliveries had been placed under Government loan. In the 1958 season, about $2\frac{1}{2}$ percent of the crop went under loan, and in the 1957 season, about $3\frac{1}{2}$ percent.

Under existing law, the level of support for the 1960 burley crop will be 90 percent of the applicable parity price. The adjusted base price for calculating the 1960 burley parity will be higher than that used to determine the 1959 parity. If the parity index should remain near the current level, the parity price for burley in 1960 may be 3 or 4 percent higher than it was when the support level for the 1959 crop was set.

Supplies

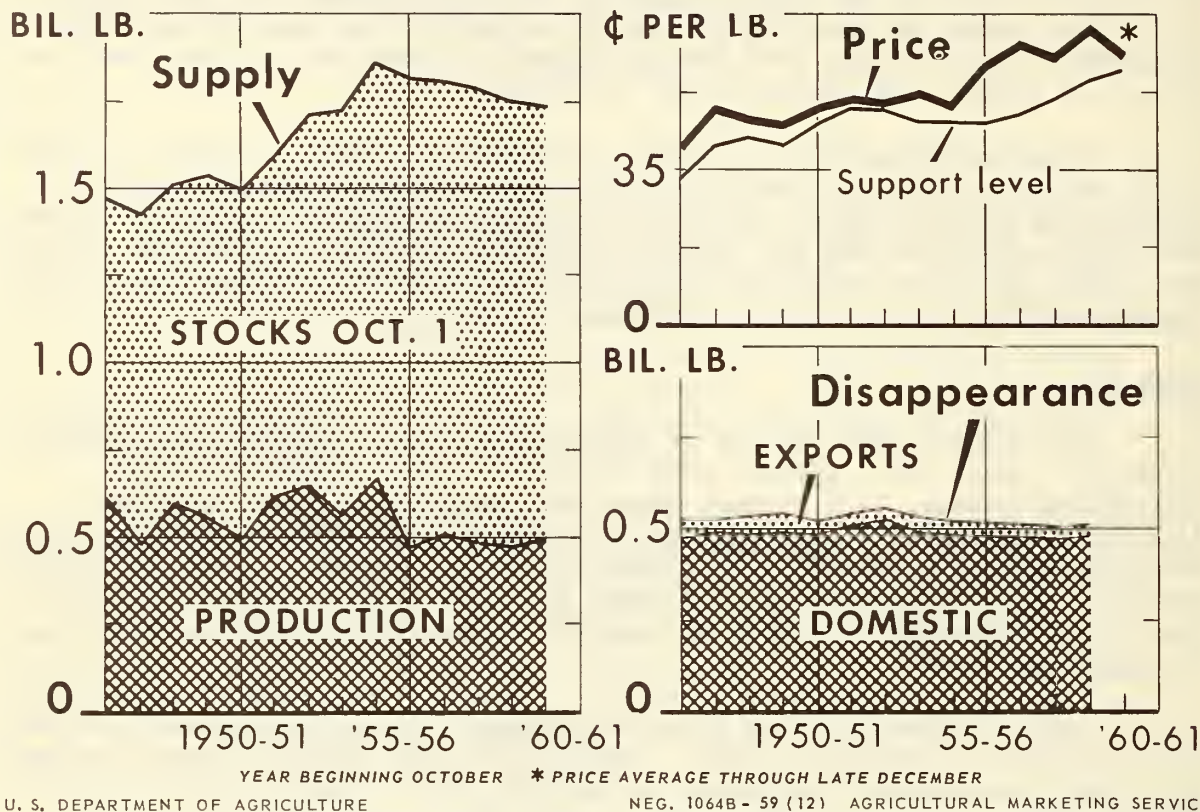
The 1959-60 total supply of burley tobacco is 1,736 million pounds--15 million pounds or 1 percent lower than for 1958-59. The 1959 crop, 500 million pounds, is 7 percent above that produced in 1958, smallest in 16 years. Harvested acreage increased 1 percent over 1958 and average yields are estimated at a record 1,660 pounds per acre. October 1, 1959 carryover totaled 1,236 million pounds--4 percent less than a year earlier. This decline in carryover more than offsets the increase in production between this year and last.

Total stocks of burley have been reduced 110 million pounds from the peak holdings on October 1, 1955. The 1959-60 total supply is equal to about 3.3 times prospective disappearance, compared with a ratio of 3.4 in 1958-59. In the 5 years prior to 1958-59, this ratio varied between 3.3 and 3.6. A desirable average level of supply is generally considered to be 2.8 times disappearance.

In recent months, large sales of burley have been made from Government loan stocks. Although the figures on Government loan holdings appearing in table 12 show stocks of $215\frac{1}{2}$ million pounds (farm-sales weight equivalent) as of November 30, 1959, these data do not as yet fully reflect all the sales that have been made. According to the most recent report, about 85 million pounds (farm-sales weight equivalent) remain. This is a reduction of about 165 million pounds from loan stocks held August 31, and nearly 190 million pounds from loan stocks held November 30 a year ago. All holdings of the 1952 and 1953 crops have been sold; practically all stocks of the 1955 crop and most of those of the 1956 crop have also been disposed of.

The 1960 burley marketing quota and acreage allotment will be announced by February 1. Burley growers approved marketing quotas for their 1959-61 crops in a referendum held in February 1959.

BURLEY TOBACCO



Domestic Use and Exports

During the year ended September 30, domestic use of burley at 480 million pounds was up 1 percent from the previous year. Though relatively small, the increase was the first in 6 years. The upturn accompanied a gain of 6 1/2 percent in cigarette production in the 1958-59 marketing year. In the same period, output of smoking tobacco and plug chewing--secondary outlets for burley--was down 1.3 percent and 2.7 percent, respectively. The domestic use of burley may increase some in the current marketing year, reflecting the expected continued rise in cigarette output. Comparatively little change is expected in production of smoking tobacco in the year ahead, but output of plug chewing is likely to decline further.

Exports of burley tobacco at 35 million pounds (farm-sales weight) were 7 million above the level of the previous 2 years and were the largest since 1953-54. West Germany, accounting for over a fourth of the total, took 12 percent more than in 1957-58. Italy was the second ranking outlet, taking 3 times as much as a year earlier and the most since 1947-48. Mexico, ranking 3rd,

(Farm-sales weight)

1/ Year beginning October 1. 2/ Subject to revision. 3/ As of applicable date when support level was computed. 4/ Actual loan stocks on a packed-weight basis average about 11 percent less than these farm-sales weight figures. 5/ Approximately 130 million pounds of the reported November 30 total has been sold; all stocks of 1952 and 1953, a substantial part of 1954, practically all of 1955 and most of 1956. 6/ Through December 18 about 11 million pounds, 2½ percent of deliveries placed under loan. *Auction market average through December 18.

took the largest quantity in 5 years--over two fifths more than in 1957-58. Exports to France more than tripled, and were the largest since the peak shipments in the immediate postwar years. Takings by Denmark were over $2\frac{1}{2}$ times as much as in 1957-58 and were twice the preceding 5-year average. Exports to Australia jumped to a record level. On the other hand, shipments to Sweden--fourth ranking outlet--dropped by 37 percent, and to Portugal, by 30 percent. Exports to Belgium, which have declined in recent years, continued to fall off. Netherlands also took less burley than in 1957-58, and shipments to Egypt, which in recent years have ranged between 1 and $1\frac{1}{2}$ million pounds, dropped to less than 400,000 pounds.

Maryland, Type 32 4/

Prices

The 1959 Maryland crop will go to auction next spring and summer. Auction markets usually open in May and run until late July or early August. The Baltimore hogshead market, also operated for Maryland tobacco, accounts for approximately a tenth of total sales.

Government price support will not be available for the 1959 crop as more than a third of producers voting disapproved marketing quotas. Prices for the 1958 crop averaged a record 62.3 cents per pound--17 cents more than for the drought-affected 1957 crop and 13 cents more than the 1952-56 average. Quality of the crop was the best in several years. About 4 percent of market deliveries was placed under Government loan.

Under present law, if growers approve marketing quotas for the 1960 Maryland crop, it must be supported at 90 percent of parity.

Supplies

The 1959 crop of Maryland tobacco is estimated at 33.2 million pounds --7 percent larger than last year. Acreage allotments were not in effect in 1959. Harvested acreage rose 12 percent from 1958 but the average yield per acre, indicated at 875 pounds, was below those of the preceding 2 years.

This year's crop, added to the estimated carryover of about 65 million pounds on January 1, 1960, will provide a total supply of 98.2 million pounds. This is $3\frac{1}{2}$ percent less than for 1958-59 and the lowest in 9 years.

The 1960 marketing quota and acreage allotment for Maryland tobacco will be announced by the Secretary of Agriculture by February 1. Within 30 days following the announcement, growers will vote in a referendum on whether

4/ For marketing quota purposes, the carryover and total supply of Maryland tobacco are calculated as of January 1 falling within the marketing year--the 12-month period, October 1 through September 30. Disappearance is calculated on the October-September basis.

(Farm-sales weight)

1/ For marketing quota purposes, the carryover and total supply of Maryland tobacco are calculated as of January 1 falling within the marketing year—October 1 through September 30. 2/ Year beginning October 1. 3/ Subject to revision. 4/ As of applicable date when support level was computed or October 1. 5/ Actual loan stocks on a packed-weight basis average about 2 percent less than these farm-sales weight figures. 6/ Marketing quota not in effect since less than two-thirds of growers voting approved. *Estimated.

marketing quotas are to be applicable to the 1960, 1961, and 1962 crops. Approval by at least two-thirds of the growers voting is necessary to place marketing quotas in effect. In last February's referendum, 64.2 percent of the growers voting approved marketing quotas--barely short of the required two-thirds majority.

Domestic Use and Exports

Domestic use of Maryland tobacco during October 1958-September 1959 was 21 $\frac{1}{2}$ million pounds--nearly 4 million below 1957-58 and about equal to the low figure for 1956-57.

Maryland tobacco is primarily a cigarette tobacco, but some is used in cigars. Domestic use of Maryland has failed to keep pace with expanding cigarette output. Use as filler in cigars varies from year to year, depending upon the availability and prices of certain grades. These fluctuations may be considerable, affecting total domestic use accordingly. Reduced usage of Maryland in cigars may have been a factor in the decline in 1958-59 domestic utilization.

The decline in domestic disappearance was offset by larger exports. Exports of Maryland tobacco in the year ended September 30 at 15.3 million pounds (farm-sales weight) were 31 percent higher than in 1957-58 and were the most since the mid-1920's. Exports to virtually all major outlets were larger than in 1957-58. Switzerland, the leading market as usual, accounted for close to half of the total. Swiss takings increased 6 percent over those in each of the two preceding years, though they were moderately below the peak shipments in 1955-56. Exports to Portugal, second ranking market in 1958-59, were over three times those of a year earlier and nearly twice those of 2 years earlier. Germany, third ranking market, increased takings by more than 50 percent. Netherlands, Spain and Belgium each took approximately 1 million pounds. This was substantially more than went to each of these countries in other postwar years. Exports to France were up by about an eighth, but to Tunisia, dropped to only a fourth of those in the preceding year. A significant quantity was exported to Viet Nam, in contrast to none a year earlier.

Fire-cured, Types 21-23

Prices

Auction markets for Virginia fire-cured tobacco (type 21) began on November 30. For sales through December 17, prices averaged 38.0 cents per pound, compared with 37.8 cents a year earlier. Quality of offerings was better than a year ago. Markets are closed from December 18 until January 4. Auctions for Kentucky-Tennessee fire-cured, type 22, are scheduled to open January 11, and for type 23, January 12.

The Government support level for 1959 fire-cured is 38.8 cents a pound--the same as for the two previous crops. Supports for Virginia fire-cured, type 21, and Kentucky-Tennessee fire-cured, types 22-23, are based on 75 percent of the burley support, but they cannot go above their 1957 support level--38.8 cents--unless 90 percent of their own parities exceeds that figure. In the Virginia markets thus far, about 6 percent of gross sales have been delivered for Government loans, compared with 17 percent in the corresponding period of a year ago.

Supplies

The 1959-60 total supply of fire-cured tobacco at 174 million pounds is 1 percent below the previous record low of 1958-59. The 1959 crop--52½ million pounds--is about a fifth larger than the all-time low of a year ago, but the increase does not fully offset the 9 percent decline in carryover. Harvested acreage was up about an eighth from last year, mainly because of the return to production of land formerly in the Soil Bank acreage reserve. The average yield per acre was the second highest on record.

For Virginia, type 21, supplies are little changed from those in 1958-59. An increase of about 1¼ percent in production balances a decline in carryover to the lowest level in 10 years. However, an increase of nearly a fourth in production of Kentucky-Tennessee fire-cured fails to offset a decline in October 1 stocks to the lowest point since 1946; total supplies are 2 percent lower than in 1958-59.

The 1959-60 total supply of fire-cured is about 3.1 times probable disappearance, compared with a ratio of 3.2 in 1958-59. In the 5 years preceding 1958-59, this ratio varied between 3.1 and 3.3. In the 5 years prior to the outbreak of World War II, the ratio averaged 2.5, generally ranging from 2.2 to 2.6. Government loan stocks are relatively heavy, and consist predominantly of tobacco from the 1956 and 1957 crops.

Marketing quotas will be in effect for 1960 fire-cured, as growers approved quotas for the 1958-60 crops. The 1960 marketing quotas and acreage allotments for Virginia fire-cured (type 21) and Kentucky-Tennessee fire-cured (types 22-23) will be announced by the Secretary of Agriculture by February 1.

Domestic Use and Exports

In the marketing year ended September 30, total disappearance of the fire-cured types was about 55 million pounds, about 8 million less than in each of the two preceding years and a record low. Reductions occurred both in domestic disappearance and exports. Domestic use, 30 million pounds, dropped a tenth below 1957-58. This reduction was proportionately much larger than occurred in output of snuff--principal domestic outlet for the fire-cured types--indicating that less fire-cured may have been used in other products than in 1957-58. The decline in domestic utilization of fire-cured was attributable to smaller use of Kentucky-Tennessee, types 22-23. Domestic disappearance of Virginia fire-cured (which comprised approximately a fifth of the total) increased by a third.

(Farm-sales weight)

1/ Year beginning October 1. 2/ Subject to revision. 3/ As of applicable date when support level was computed. 4/ Data for 1950-57 are parity prices for all fire-cured tobacco--starting with 1958, type 21 parity computed separately. 5/ Set at 75 percent of burley support, but since 1957, cannot exceed its 1957 support level unless 90 percent of types 22-23 parity exceeds such level. 6/ Actual loan stocks on a packed-weight basis are somewhat lower than these farm-sales weight figures. 7/ Through mid-December about 6 percent of marketings were placed under loan.

Table 15.—Fire-cured tobacco, types 22-23^{1/}: Domestic supplies, disappearance, season average price, and price support operations for specified periods

| (Farm-sales weight) | | | | | | | |
|---------------------|-------------|-------------------|----------|------------------|----------|----------|-------------------------------|
| Year | Production: | Stocks, Oct. 1 | Supply | Disappearance 2/ | | | Average price per pound |
| | | | | Total | Domestic | Exports | |
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Ct. |
| Average: | | | | | | | |
| 1934-38 | 90.8 | 163.6 | 254.4 | 101.6 | 43.4 | 58.2 | 10.0 |
| 1941-45 | 54.0 | 139.4 | 193.4 | 66.4 | 41.0 | 25.4 | 21.0 |
| 1947-49 | 64.4 | 132.1 | 196.5 | 57.3 | 30.7 | 26.6 | 30.1 |
| 1950 | 45.4 | 141.8 | 187.2 | 64.6 | 30.7 | 33.9 | 29.7 |
| 1951 | 46.1 | 122.6 | 168.7 | 48.8 | 25.8 | 23.0 | 40.3 |
| 1952 | 46.0 | 119.9 | 165.9 | 48.3 | 24.2 | 24.1 | 38.1 |
| 1953 | 39.7 | 117.6 | 157.3 | 49.5 | 26.0 | 23.5 | 33.3 |
| 1954 | 51.6 | 107.8 | 159.4 | 48.9 | 23.9 | 25.0 | 38.5 |
| 1955 | 54.7 | 110.5 | 165.2 | 52.0 | 24.6 | 27.4 | 38.4 |
| 1956 | 59.9 | 113.2 | 173.1 | 52.3 | 27.5 | 24.8 | 36.1 |
| 1957 | 41.9 | 120.8 | 162.7 | 53.3 | 29.5 | 23.8 | 36.4 |
| 1958 | 33.9 | 109.4 | 143.3 | 44.1 | 24.6 | 19.5 | 38.1 |
| 1959 3/ | 41.7 | 99.2 | 140.9 | | | | |
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^{1/} Type 24 included until early 1950's when it became practically nonexistent. ^{2/} Year beginning October 1. ^{3/} Subject to revision. ^{4/} As of applicable date when support level was computed. ^{5/} Data for 1950-57 are parity prices for all fire-cured tobacco—starting with 1958, types 22-23 parity computed separately. ^{6/} Set at 75 percent of burley support, but since 1957, cannot exceed its 1957 support level unless 90 percent of types 22-23 parity exceeds such level. ^{7/} Actual loan stocks on a packed-weight basis are somewhat lower than these farm-sales weight figures.

In the October 1958-September 1959 marketing year, exports of fire-cured totaled about $24\frac{1}{2}$ million pounds (farm-sales weight)--lowest peacetime exports on record. In 1957-58, exports amounted to about 29 million pounds, only a little below the average for the 5 preceding years. Exports of Kentucky-Tennessee fire-cured at $19\frac{1}{2}$ million pounds were down nearly a fifth from 1957-58. The Netherlands, accounting for over two-fifths of the total, took 25 percent more. There were also increases in shipments to Denmark, United Kingdom, Portugal, Canary Islands, Viet Nam and Australia. On the other hand, France--third ranking outlet--took only a third as much as in 1957-58 and far less than in each of the previous 4 years. Belgium, fourth ranking outlet, reduced her takings by about a fourth, while Switzerland, ranking second, took moderately less. Less than in the previous year also went to Egypt, Sweden, Norway, Italy, Indonesia and French West Africa. None went to Belgian Congo which in the 1957-58 marketing year took a substantial quantity. German takings held about even.

Exports of Virginia fire-cured at a little over 5 million pounds (farm-sales weight) were moderately below 1957-58. Norway, as usual the leading outlet, took 5 percent less. Smaller shipments than a year earlier also went to Germany, Austria, Netherlands and Sweden. Countries taking more than in 1957-58 were United Kingdom, New Zealand and Australia.

Dark Air-Cured and Sun-Cured, Types 35-37

Prices

Auction markets for One Sucker and Green River (Kentucky-Tennessee dark air-cured, types 35 and 36) opened during the first half of December. For sales through December 19, type 35 prices averaged 34.3 cents per pound, and through December 18 type 36 averaged 34.2 cents. A year earlier type 35 prices averaged 37.7 cents, and type 36 averaged 36.8 cents. Auctions at Richmond opened for Virginia sun-cured (type 37) on December 8. For all sun-cured sales through December 18, prices averaged 34.2 cents per pound, compared with 37.8 cents in the corresponding 1958 period.

The Government price support level for 1959 dark air-cured and sun-cured tobacco is $34\frac{1}{2}$ cents--the same as for the last two crops. The supports for dark air- and sun-cured are based on 66-2/3 percent of the burley support level, but cannot go above their 1957 support levels--34.5 cents--unless 90 percent of their own parities exceeds that figure.

Through mid-December, about 15 percent of auction market offerings of One Sucker and about 14 percent of those of Green River were placed under loan. In the comparable period a year ago, about 3 percent of the One Sucker and $3\frac{1}{2}$ percent of Green River were delivered for loans. Loan receipts of Virginia sun-cured were minor, as usual.

Table 16.—Dark air-cured tobacco, types 35-36: Domestic supplies, disappearance, season average price, and price support operations for specified periods

[illegible]

1/ Year beginning October 1. 2/ Subject to revision. 3/ As of applicable date when support level was computed. 4/ Set at 66-2/3 percent of burley support, but since 1957, cannot exceed its 1957 support level unless 90 percent of types 35-36 parity exceeds such level. 5/ Actual loan stocks on a packed-weight basis are somewhat lower than these farm-sales weight figures. 6/ An additional 200,000 pounds under option to British manufacturers were pledged for CCC loans but purchased and shipped by mid-1953. 7/ Through mid-December about 14½ percent of dark air-cured marketings were placed under loan.

Table 17.—Sun-cured tobacco, type 37: Domestic supplies, disappearance, season average price, and price support operations for specified periods

[illegible]

1/ Year beginning October 1. 2/ Subject to revision. 3/ As of applicable date when support level was computed. 4/ Set at 66-2/3 percent of burley support, but since 1957, cannot exceed the 1957 support level unless 90 percent of type 37 parity exceeds such level.

Supplies

The 1959-60 total supply of dark air-cured and sun-cured tobacco at 90 $\frac{1}{2}$ million pounds is 6 percent lower than for 1958-59 and the second smallest on record. Carryover stocks of about 68 $\frac{1}{2}$ million pounds were down about an eighth from a year ago and were the smallest since 1946. The drop in stocks was not fully offset by the increase in the 1959 crop, which totaled 22 million pounds--more than a fifth above the 1958 record small crop. The gains in output were proportionately largest in Green River and Virginia sun-cured, both up by nearly three-tenths. Production of One Sucker increased by 18 percent. Acreages for all three types were larger than in 1958, reflecting the return to production of land formerly in the Soil Bank acreage reserve. Average yields per acre for types 35 and 37 were second highest on record, and for type 36 were third highest on record.

The 1959-60 supply of dark air-cured and sun-cured tobacco is equal to about 3.4 times prospective disappearance, compared with 3.5 in 1958-59. In the 5 years preceding 1958-59, this ratio averaged 3.7, ranging from 3.3 to 4.2. In the 5 years prior to the outbreak of World War II, the ratio, ranging from 2.2 to 2.7, averaged 2.5. Government loan stocks of dark air-cured tobacco are relatively large.

Marketing quotas and acreage allotments for 1960 dark air-cured and Virginia sun-cured tobacco will be announced by February 1. Producers of dark air-cured (types 35-36) approved marketing quotas for their 1958-60 crops in a referendum held February 1958. Growers of sun-cured (type 37), in last February's referendum, approved marketing quotas for their 1959-61 crops.

Domestic Use and Exports

In the year ended September 30, total disappearance of dark air- and sun-cured was 27 $\frac{1}{2}$ million pounds--about the same as in the preceding year. Domestic disappearance was down a little, but exports increased moderately. Domestic use at about 19 $\frac{3}{4}$ million pounds was 4 percent below 1957-58. The main outlet for dark air-cured and sun-cured in this country is in the manufacture of chewing tobacco, which in the 1958-59 marketing year declined 1.3 percent. Usage of Kentucky-Tennessee dark air-cured was 5 percent below 1957-58 but domestic utilization of Virginia sun-cured increased about 16 percent.

Exports of dark air- and sun-cured in 1958-59 totaled about 7 $\frac{3}{4}$ million pounds (farm-sales weight). This was 13 percent higher than in 1957-58, with the increase attributable to larger exports of One Sucker. Last year's exports, however, were nearly a third below the unusually large shipments in 1956-57, when exports were swelled by sales of dark air-cured from loan stocks at reduced prices.

A substantial part of dark air-cured tobacco exports is in the form of Black Fat--a semiprocessed product. Exports of Black Fat in 1958-59 were practically the same as a year earlier. There were small increases in

consignments to Nigeria and Ghana, the first and second ranking markets, respectively. But exports to French West Africa, traditionally the third ranking market, were 7 percent smaller. Less Black Fat than a year earlier went to Cameroon, Canary Islands, and Spanish Africa.

Exports of One Sucker leaf amounted to nearly $2\frac{1}{2}$ million pounds (farm-sales weight), close to three times as much as in 1957-58. A large shipment to Austria accounted for nearly two-fifths of the total. Most of the remainder went to Belgium and Portugal. Exports of Green River amounted to 1.1 million pounds (farm-sales weight)--about a fourth below those in 1957-58. Consignments to the United Kingdom comprised over three-fifths of the total, and were over 50 percent higher than in the preceding year. A significant quantity went to Austria in contrast to none in 1957-58. On the other hand, lower exports than a year earlier went to Belgium and Belgian Congo. None was reported as going to Portugal, which took a sizable quantity in 1957-58.

Cigar, Types 41-62

Cigar Leaf Prices

Most cigar tobacco is purchased at the "barn door" during the fall and winter. The demand for Pennsylvania filler type 41 was strong this season. Even though the crop was the largest in 8 years prices averaged about $31\frac{1}{2}$ cents per pound--an eighth higher than in 1958. The Ohio filler crop also has been reported as largely sold at prices averaging above last year's.

In the Connecticut Valley nearly all of the Havana Seed crop (type 52) has been sold at prices reportedly ranging mostly from 44 to 50 cents per pound. The extremely small 1958 crop averaged 49.4 cents and the 1957 crop, 44.9 cents per pound. Some buying of the Broadleaf crop (type 51) has been reported, mostly at prices lower than last season. The growers' cooperative began receiving tobacco for price support loans on December 7.

Marketing of Wisconsin binder types 54 and 55 begin in January.

Government support prices for the 1959 crops of the eligible cigar types are shown in table 18 and price support operations in table 19. The 1959 price support for the Connecticut Valley binder types at 39.6 cents per pound is about a fourth lower than last year's level. Last January the Department announced a change in the method of computing the parity price for these types which lowered it considerably. (See the March 1959 issue of the Tobacco Situation pages 46-47 for a discussion of this.)

By law the support levels for the eligible continental cigar types must be set at 90 percent of parity when marketing quotas are in effect. Marketing quotas have been continuously in effect on the Ohio filler-Wisconsin binder tobaccos and the Connecticut Valley binder tobaccos since 1952.

Table 18.--Cigar tobacco types: Government price support levels, 1957-59, and season average prices, 1957-58

| Type | 1957 | | 1958 | | 1959 |
|--|------------------------|----------------------|------------------------|----------------------|------------------------|
| | Price support level 1/ | Season average price | Price support level 1/ | Season average price | Price support level 1/ |
| | Cents per pound | Cents per pound | Cents per pound | Cents per pound | Cents per pound |
| Ohio cigar filler, types 42-44 | 23.2 | 22.8 | 23.4 | 24.2 | 23.4 |
| Puerto Rican filler, type 46 | 32.5 | 27.5 | 31.2 | 2/30.0 | 29.7 |
| Connecticut Valley Broadleaf binder, type 51 | 3/53.8 | 50.0 | 3/56.2 | 54.0 | 3/39.6 |
| Connecticut Valley Havana Seed binder, type 52 | 48.8 | 44.9 | 48.0 | 49.4 | 39.6 |
| Southern Wisconsin binder, type 54 | 23.3 | 31.1 | 25.5 | 34.6 | 26.5 |
| Northern Wisconsin binder, type 55 | 29.9 | 33.5 | 31.0 | 35.2 | 32.0 |

1/ For Pennsylvania Havana Seed, type 53: 1957, 23.3 cents; and 1958, 25.5 cents; 1959, 26.5 cents.

2/ Preliminary.

3/ Broadleaf (type 51) supported only on an unsorted basis.

Table 19.--Cigar tobacco price support operations, quantities placed under loan, 1950-58 and remaining under loan Nov. 30, 1959

| Crop year | Ohio, types 42-44 | Puerto Rican, type 46 | Conn. Valley, type 51 | Conn. Valley, type 52 | So. Wis., type 54 | No. Wis., type 55 | Total |
|-------------------------------|-------------------|-----------------------|------------------------------|-----------------------|-------------------|-------------------|----------------|
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| 1950 | 2.6 | .3 | .1 | 3.7 | 1.4 | .6 | 1/11.5 |
| 1951 | .6 | 1.1 | 1.7 | 2.7 | 4.8 | .1 | 1/11.0 |
| 1952 | 2/ | 1.4 | 2/ | 2/ | 2/ | 2/ | 1.4 |
| 1953 | 2.7 | 1.4 | 3/ | 1.8 | 2.4 | 1.9 | 1/10.3 |
| 1954 | 1.2 | 5.1 | .8 | 3.4 | 1.3 | .9 | 12.7 |
| 1955 | .8 | 2.8 | 7.8 | 5.2 | .4 | 3.1 | 20.1 |
| 1956 | .4 | 1.5 | 1.7 | 1.6 | .1 | .9 | 6.2 |
| 1957 | .1 | 1.5 | 2.5 | .4 | --- | .3 | 4.8 |
| 1958 | 0 | 1.7 | .3 | .1 | 0 | .1 | 2.2 |
| 1959 | | | Marketings not yet completed | | | | |
| Total | 8.4 | 16.8 | 14.9 | 18.9 | 10.4 | 7.9 | 1/80.2 |
| Remaining as of Nov. 30, 1959 | 0 | 0 | 6.2 | 5.2 | 0 | .7 | 12.1 |

1/ Includes 2.8 million pounds of 1950 crop Pennsylvania Seedleaf (type 41) and negligible amounts from the 1950, 1951, and 1953 crops of New York and Pennsylvania Havana seed (type 53).

2/ Price support not in effect because marketing quotas were disapproved by growers.

3/ Less than 50,000 pounds.

If growers disapprove marketing quotas the law does not permit price supports to be made available. Growers of Pennsylvania type 41 have disapproved a marketing quota in each referendum held for their type. The growers of type 42-44, 53-55 (principally Ohio and Wisconsin) and types 51-52 (principally Connecticut and Massachusetts) will be voting in early 1960 on whether they favor quotas on their next three crops.

In Puerto Rico, the 1958 cigar filler crop (type 46), mostly harvested and marketed during the first half of 1959, averaged about 30 cents per pound--9 percent higher than a year earlier. A Federal marketing quota has not been in effect on Puerto Rican tobacco since its supply position has not required it. Its price support is based on a percentage of the parity price that varies in accordance with a sliding scale, depending upon its total supply position. Although there has not been a Federal marketing quota, the Puerto Rican Commonwealth Government has been setting a quota for the type. As in the past two years, the supply of Puerto Rican tobacco on October 1 was not above normal and price support for the crop to be marketed in the first half of 1960 was set at 90 percent of parity.

Supplies of Filler and Binder

Filler: The 1959-60 total supply of Pennsylvania cigar filler at 158 million pounds is 2 percent above 1958-59 and 8 percent above the longtime low of 2 years ago. The 1959 crop topped the 1958 crop by 5 percent and carryover on October 1 was also up slightly. The 1959-60 total supply of Ohio cigar filler at 24 million pounds is 4 percent above the record low of a year earlier. The 1959 crop was substantially larger than the abnormally small 1958 crop and the increase more than offset the decline in carryover.

October 1 stocks of Puerto Rican tobacco dropped 15 percent from a year earlier. If the crop now planted turns out a little larger than a year ago, as expected, then the 1959-60 supply may total about 68 million pounds; this would be 9 percent below 1958-59 and the lowest for many years.

Binder: The 1959-60 total supply of Connecticut Valley binder is about 43 million pounds, fairly close to the low of a year earlier. The 1959 production increased sharply compared with the extremely small 1958 figure, but was still the third smallest on record. Carryover declined to a record low. The sharp reduction in production due to the Soil Bank acreage reserve program in 1956-58 was the major factor lowering total supply of these types by nearly a half in the past 5 years.

The 1959-60 total supply of Wisconsin binder at about $71\frac{1}{2}$ million pounds is $4\frac{1}{2}$ percent above the record low of 1958-59. The 1959 production of both the Northern and Southern Wisconsin types was larger than a year ago, both up about a sixth. Carryover of the combined types was down only slightly from a year earlier; there was a moderate increase in Southern Wisconsin carryover but this was more than offset by the decline in Northern Wisconsin carryover.

Table 20.--Cigar filler tobacco, types 41-46: Domestic supplies, disappearance, and season average prices, 1947-59

(Farm-sales weight)

| Year | Production | Stocks Oct. 1 | Supply | Disappearance 1/ | | | Average price per pound |
|----------------------------------|------------|------------------|---------|------------------|----------|---------|-------------------------------|
| | | | | Total | Domestic | Exports | |
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Cents |
| Pennsylvania Seedleaf (type 41) | | | | | | | |
| 1947 | 52.1 | 98.5 | 150.6 | 50.8 | 49.3 | 1.5 | 30.5 |
| 1948 | 57.4 | 99.8 | 157.2 | 51.2 | 50.5 | .7 | 26.3 |
| 1949 | 54.2 | 106.0 | 160.2 | 44.4 | 43.7 | .7 | 26.4 |
| 1950 | 56.0 | 115.8 | 171.8 | 45.6 | 45.0 | .6 | 26.4 |
| 1951 | 56.2 | 126.2 | 182.4 | 50.0 | 49.3 | .7 | 19.0 |
| 1952 | 37.9 | 132.4 | 170.3 | 51.2 | 50.8 | .4 | 25.2 |
| 1953 | 38.2 | 119.1 | 157.3 | 51.6 | 51.4 | .2 | 27.5 |
| 1954 | 48.8 | 105.7 | 154.5 | 41.5 | 41.4 | .1 | 27.4 |
| 1955 | 45.7 | 113.0 | 158.7 | 55.0 | 54.6 | .4 | 24.5 |
| 1956 | 48.4 | 103.7 | 152.1 | 46.8 | 46.6 | .2 | 24.0 |
| 1957 | 41.2 | 105.3 | 146.5 | 43.0 | 42.9 | .1 | 20.5 |
| 1958 | 51.0 | 103.7 | 154.7 | 50.4 | 50.1 | .3 | 28.0 |
| 1959 2/ | 53.5 | 104.5 | 158.0 | | | | |
| Ohio, Miami Valley (types 42-44) | | | | | | | |
| 1947 | 8.4 | 23.7 | 32.1 | 8.2 | 8.2 | | 31.0 |
| 1948 | 10.9 | 23.9 | 34.8 | 8.9 | 8.9 | | 23.0 |
| 1949 | 11.2 | 25.9 | 37.1 | 9.1 | 9.1 | | 25.0 |
| 1950 | 10.5 | 28.0 | 38.5 | 7.3 | 7.3 | | 18.6 |
| 1951 | 7.3 | 31.2 | 38.5 | 10.0 | 10.0 | | 24.4 |
| 1952 | 8.8 | 28.5 | 37.3 | 10.0 | 10.0 | | 25.0 |
| 1953 | 6.6 | 27.3 | 33.9 | 9.8 | 9.8 | | 18.5 |
| 1954 | 8.0 | 24.1 | 32.1 | 9.2 | 9.2 | | 22.5 |
| 1955 | 7.5 | 22.9 | 30.4 | 7.2 | 7.2 | | 21.8 |
| 1956 | 6.3 | 23.2 | 29.5 | 6.4 | 6.4 | | 22.0 |
| 1957 | 4.6 | 23.1 | 27.7 | 7.2 | 7.2 | | 22.8 |
| 1958 | 2.5 | 20.5 | 23.0 | 5.9 | 5.9 | | 24.2 |
| 1959 2/ | 6.8 | 17.1 | 23.9 | | | | |
| Puerto Rico (type 46) | | | | | | | |
| 1947 | 26.1 | 74.0 | 100.1 | 32.1 | 30.6 | 1.5 | 27.5 |
| 1948 | 27.0 | 68.0 | 95.0 | 41.8 | 32.9 | 8.9 | 27.0 |
| 1949 | 26.0 | 53.2 | 79.2 | 28.1 | 25.9 | 2.2 | 20.0 |
| 1950 | 25.5 | 51.1 | 76.6 | 28.8 | 28.5 | .3 | 28.0 |
| 1951 | 28.1 | 47.8 | 75.9 | 34.1 | 33.8 | .3 | 30.0 |
| 1952 | 34.3 | 41.8 | 76.1 | 28.9 | 28.6 | .3 | 32.0 |
| 1953 | 34.1 | 47.2 | 81.3 | 32.1 | 32.0 | .1 | 30.0 |
| 1954 | 34.0 | 49.2 | 83.2 | 23.9 | 23.8 | .1 | 30.5 |
| 1955 | 30.0 | 59.3 | 89.3 | 31.7 | 31.6 | .1 | 25.2 |
| 1956 | 24.0 | 57.6 | 81.6 | 31.3 | 30.9 | .4 | 30.8 |
| 1957 | 26.7 | 50.3 | 77.0 | 27.4 | 27.4 | .1 | 27.5 |
| 1958 | 25.6 | 49.6 | 75.2 | *30.0 | *28.8 | *1.2 | 30.0 |
| 1959 2/ | 3/26.0 | *45.2 | *71.2 | | | | |

1/ Year beginning October 1. 2/ Subject to revision. 3/ Quota set by Puerto Rican Government.

*Estimated.

Table 21 --Cigar binder tobacco, types 51-52: Domestic supplies, disappearance, and season average prices, 1947- 59

| (Farm-sales weight) | | | | | | | |
|--|-------------------|---------------------|-------------------|-------------------|-------------------|-------------------|-------------------------------|
| Year | Production | Stocks October 1 | Supply | Disappearance 1/ | | | Average price per pound |
| | | | | Total | Domestic | Exports | |
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Cents |
| Connecticut Valley Broadleaf (type 51) | | | | | | | |
| 1947 | 15.0 | 28.6 | 43.6 | 13.3 | | | 51.0 |
| 1948 | 14.0 | 30.3 | 44.3 | 17.8 | 13.5 | 4.3 | 60.0 |
| 1949 | 14.1 | 26.5 | 40.6 | 12.9 | 11.8 | 1.1 | 53.0 |
| 1950 | 16.4 | 27.7 | 44.1 | 14.3 | 13.3 | 1.0 | 52.0 |
| 1951 | 14.5 | 29.8 | 44.3 | 14.1 | 13.2 | .9 | 51.0 |
| 1952 | 14.8 | 30.2 | 45.0 | 14.5 | 13.8 | .7 | 50.0 |
| 1953 | 14.7 | 30.5 | 45.2 | 13.4 | 12.7 | .7 | 58.4 |
| 1954 | 13.3 | 31.8 | 45.1 | 11.7 | 11.5 | .2 | 56.5 |
| 1955 | 12.1 | 33.4 | 45.5 | 14.7 | 14.3 | .4 | 44.9 |
| 1956 | 7.5 | 30.8 | 38.3 | 12.8 | 11.3 | 1.5 | 59.0 |
| 1957 | 5.1 | 25.5 | 30.6 | 8.4 | 7.7 | .7 | 50.0 |
| 1958 | 3.6 | 22.2 | 25.8 | 5.8 | 5.6 | .2 | 54.0 |
| 1959 2/ | 5.0 | 20.0 | 25.0 | | | | |
| Connecticut Valley Havana Seed (type 52) | | | | | | | |
| 1947 | 15.1 | 16.5 | 31.6 | 12.2 | | | 73.3 |
| 1948 | 14.6 | 19.3 | 33.9 | 14.1 | 9.4 | 4.7 | 62.3 |
| 1949 | 14.7 | 19.8 | 34.5 | 9.5 | 7.4 | 2.1 | 41.9 |
| 1950 | 15.2 | 25.0 | 40.2 | 12.9 | 11.2 | 1.7 | 39.8 |
| 1951 | 11.2 | 27.3 | 38.5 | 11.0 | 9.1 | 1.9 | 42.6 |
| 1952 | 9.6 | 27.5 | 37.1 | 12.9 | 11.5 | 1.4 | 48.9 |
| 1953 | 12.0 | 24.2 | 36.2 | 11.9 | 10.8 | 1.1 | 54.9 |
| 1954 | 11.9 | 24.3 | 36.2 | 12.9 | 12.2 | .7 | 44.0 |
| 1955 | 9.9 | 23.3 | 33.2 | 11.6 | 10.1 | 1.5 | 35.0 |
| 1956 | 5.8 | 21.6 | 27.4 | 7.2 | 5.7 | 1.5 | 42.3 |
| 1957 | 3.2 | 20.2 | 23.4 | 7.5 | 6.3 | 1.2 | 44.9 |
| 1958 | 1.8 | 15.9 | 17.7 | 3.2 | 2.6 | .6 | 49.4 |
| 1959 2/ | 3.5 | 14.5 | 18.0 | | | | |
| Total Connecticut Valley (types 51-52) | | | | | | | |
| 1947 | 30.1 | 45.1 | 75.2 | 25.6 | | | 62.2 |
| 1948 | 28.6 | 49.6 | 78.2 | 31.9 | 22.9 | 9.0 | 61.2 |
| 1949 | 28.8 | 46.3 | 75.1 | 22.4 | 19.2 | 3.2 | 47.4 |
| 1950 | 31.6 | 52.7 | 84.3 | 27.2 | 24.5 | 2.7 | 46.1 |
| 1951 | 25.7 | 57.1 | 82.8 | 25.1 | 22.3 | 2.8 | 47.3 |
| 1952 | 24.4 | 57.7 | 82.1 | 27.4 | 25.3 | 2.1 | 49.6 |
| 1953 | 26.7 | 54.7 | 81.4 | 25.3 | 23.5 | 1.8 | 56.8 |
| 1954 | 25.2 | 56.1 | 81.3 | 24.6 | 23.7 | .9 | 50.6 |
| 1955 | 22.0 | 56.7 | 78.7 | 26.3 | 24.4 | 1.9 | 40.4 |
| 1956 | 13.3 | 52.4 | 65.7 | 20.0 | 17.0 | 3.0 | 51.7 |
| 1957 | 8.3 | 45.7 | 54.0 | 15.9 | 14.0 | 1.9 | 48.2 |
| 1958 | 5.4 | 38.1 | 43.5 | 9.0 | 8.2 | .8 | 52.4 |
| 1959 2/ | 8.5 | 34.5 | 43.0 | | | | |

1/ Year beginning October 1.

2/ Subject to revision.

Table 22.--Cigar binder tobacco, types 54-55: Domestic supplies, disappearance, and season average prices, 1947-59

| (Farm-sales weight) | | | | | | | |
|-------------------------------|-------------------|---------------------|-------------------|-----------------------------|-------------------|-------------------|----------------------------------|
| Year | Production | Stocks October 1 | Supply | Disappearance ^{1/} | | | Average price per pound |
| | | | | Total | Domestic | Exports | |
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Cents |
| Southern Wisconsin (type 54) | | | | | | | |
| 1947 | 15.8 | 37.9 | 53.7 | 16.5 | | | 22.3 |
| 1948 | 11.9 | 37.2 | 49.1 | 9.3 | 8.9 | .4 | 22.4 |
| 1949 | 12.6 | 39.8 | 52.4 | 12.3 | 12.3 | | 22.8 |
| 1950 | 13.2 | 40.1 | 53.3 | 13.0 | 13.0 | | 23.5 |
| 1951 | 10.4 | 40.3 | 50.7 | 16.0 | 16.0 | | 25.3 |
| 1952 | 8.3 | 34.7 | 43.0 | 9.7 | 8.1 | 1.6 | 19.5 |
| 1953 | 7.2 | 33.3 | 40.5 | 10.0 | 10.0 | | 24.3 |
| 1954 | 7.5 | 30.5 | 38.0 | 9.0 | 8.5 | .5 | 24.3 |
| 1955 | 6.7 | 29.0 | 35.7 | 10.3 | 9.9 | .4 | 22.9 |
| 1956 | 6.8 | 25.4 | 32.2 | 11.2 | 11.0 | .2 | 26.1 |
| 1957 | 7.7 | 21.0 | 28.7 | 8.7 | 8.3 | .4 | 31.1 |
| 1958 | 8.8 | 20.0 | 28.8 | 7.9 | 7.5 | .4 | 34.6 |
| 1959 ^{2/} | 10.3 | 20.9 | 31.2 | | | | |
| Northern Wisconsin (type 55) | | | | | | | |
| 1947 | 21.5 | 37.6 | 59.1 | 22.9 | | | 34.9 |
| 1948 | 18.4 | 36.2 | 54.6 | 19.4 | 17.7 | 1.7 | 23.0 |
| 1949 | 18.8 | 35.2 | 54.0 | 13.2 | 13.0 | .2 | 28.5 |
| 1950 | 18.7 | 40.8 | 59.5 | 16.4 | 16.3 | .1 | 28.1 |
| 1951 | 12.9 | 43.1 | 56.0 | 15.6 | 15.5 | .1 | 31.3 |
| 1952 | 13.6 | 40.4 | 54.0 | 18.6 | 18.4 | .2 | 31.4 |
| 1953 | 12.8 | 35.4 | 48.2 | 16.4 | 16.1 | .3 | 31.9 |
| 1954 | 15.4 | 31.8 | 47.2 | 16.3 | 16.1 | .2 | 32.7 |
| 1955 | 14.3 | 30.9 | 45.2 | 13.4 | 13.1 | .3 | 24.6 |
| 1956 | 13.4 | 31.8 | 45.2 | 13.6 | 13.4 | .2 | 30.9 |
| 1957 | 12.2 | 31.6 | 43.8 | 17.2 | 15.1 | 2.1 | 33.5 |
| 1958 | 13.0 | 26.6 | 39.5 | 14.3 | 12.0 | 2.3 | 35.2 |
| 1959 ^{2/} | 15.0 | 25.3 | 40.3 | | | | |
| Total Wisconsin (types 54-55) | | | | | | | |
| 1947 | 37.3 | 75.5 | 112.8 | 39.4 | | | 29.6 |
| 1948 | 30.3 | 73.4 | 103.7 | 28.7 | 26.6 | 2.1 | 22.7 |
| 1949 | 31.4 | 75.0 | 106.4 | 25.5 | 25.3 | .2 | 26.2 |
| 1950 | 31.9 | 80.9 | 112.8 | 29.4 | 29.3 | .1 | 26.2 |
| 1951 | 23.3 | 83.4 | 106.7 | 31.6 | 31.5 | .1 | 28.6 |
| 1952 | 21.9 | 75.1 | 97.0 | 28.3 | 26.5 | 1.8 | 26.9 |
| 1953 | 20.0 | 68.7 | 88.7 | 26.4 | 26.1 | .3 | 25.8 |
| 1954 | 22.9 | 62.3 | 85.2 | 25.3 | 24.6 | .7 | 30.0 |
| 1955 | 21.0 | 59.9 | 80.9 | 23.7 | 23.0 | .7 | 24.1 |
| 1956 | 20.2 | 57.2 | 77.4 | 24.8 | 24.4 | .4 | 29.3 |
| 1957 | 19.9 | 52.6 | 72.5 | 25.9 | 23.4 | 2.5 | 32.6 |
| 1958 | 21.8 | 46.6 | 68.4 | 22.2 | 19.5 | 2.7 | 35.0 |
| 1959 ^{2/} | 25.3 | 46.2 | 71.5 | | | | |

^{1/} Year beginning October 1.^{2/} Subject to revision.

Table 23.--Cigar wrapper tobacco, types 61-62: Domestic supplies, disappearance, and season average prices, 1947-59

| (Farm-sales weight) | | | | | | | |
|--|------------|------------------|----------|-----------------------------|----------|----------|-------------------------------|
| Year | Production | Stocks July 1 | Supply | Disappearance ^{1/} | | | Average price per pound |
| | | | | Total | Domestic | Exports | |
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Ct. |
| Connecticut Valley Shade-grown (type 61) | | | | | | | |
| 1947 | 9.3 | 10.1 | 19.4 | 8.7 | | | 310.0 |
| 1948 | 9.8 | 10.7 | 20.5 | 8.4 | | | 290.0 |
| 1949 | 11.1 | 12.1 | 23.2 | 9.6 | | | 205.0 |
| 1950 | 9.1 | 13.6 | 22.7 | 9.7 | | | 205.0 |
| 1951 | 8.2 | 13.0 | 21.2 | 8.3 | | | 205.0 |
| 1952 | 8.9 | 12.9 | 21.8 | 10.8 | | | 210.0 |
| 1953 | 10.3 | 11.0 | 21.3 | 9.9 | | | 205.0 |
| 1954 | 9.9 | 11.4 | 21.3 | 10.2 | | | 215.0 |
| 1955 | 8.8 | 11.1 | 19.9 | 9.3 | | | 215.0 |
| 1956 | 10.3 | 10.6 | 20.9 | 9.5 | | | 190.0 |
| 1957 | 11.8 | 11.4 | 23.2 | 10.1 | | | 205.0 |
| 1958 | 10.2 | 13.1 | 23.3 | 10.3 | 6.9 | 3.4 | 235.0 |
| 1959 ^{2/} | 10.9 | 13.0 | 23.9 | | | | |
| Georgia-Florida Shade-grown (type 62) | | | | | | | |
| 1947 | 4.2 | 3.2 | 7.4 | 3.6 | | | 265.0 |
| 1948 | 5.3 | 3.8 | 9.1 | 4.6 | | | 245.0 |
| 1949 | 6.2 | 4.5 | 10.7 | 4.8 | | | 195.0 |
| 1950 | 6.4 | 5.9 | 12.3 | 5.4 | | | 200.0 |
| 1951 | 6.8 | 6.9 | 13.7 | 5.4 | | | 180.0 |
| 1952 | 5.8 | 8.3 | 14.1 | 5.8 | | | 180.0 |
| 1953 | 4.5 | 8.3 | 12.8 | 6.0 | | | 195.0 |
| 1954 | 6.6 | 6.8 | 13.4 | 6.5 | | | 195.0 |
| 1955 | 6.8 | 6.9 | 13.7 | 7.3 | | | 185.0 |
| 1956 | 6.8 | 6.4 | 13.2 | 6.1 | | | 180.0 |
| 1957 | 7.1 | 7.1 | 14.2 | 6.7 | | | 190.0 |
| 1958 | 6.3 | 7.5 | 13.8 | 6.5 | 4.6 | 1.9 | 185.0 |
| 1959 ^{2/} | 7.7 | 7.3 | 15.0 | | | | |
| Total Shade-grown (types 61-62) | | | | | | | |
| 1947 | 13.5 | 13.4 | 26.9 | 12.4 | | | 296.0 |
| 1948 | 15.1 | 14.5 | 29.6 | 13.0 | 10.5 | 2.5 | 274.0 |
| 1949 | 17.3 | 16.6 | 33.9 | 14.5 | 10.8 | 3.7 | 201.0 |
| 1950 | 15.5 | 19.4 | 34.9 | 14.9 | 11.3 | 3.6 | 203.0 |
| 1951 | 14.9 | 20.0 | 34.9 | 13.7 | 10.1 | 3.6 | 194.0 |
| 1952 | 14.7 | 21.2 | 35.9 | 16.6 | 12.2 | 4.4 | 198.0 |
| 1953 | 14.8 | 19.3 | 34.1 | 15.9 | 12.2 | 3.7 | 202.0 |
| 1954 | 16.4 | 18.2 | 34.6 | 16.6 | 12.4 | 4.2 | 207.0 |
| 1955 | 15.6 | 18.0 | 33.6 | 16.6 | 11.5 | 5.1 | 202.0 |
| 1956 | 17.2 | 17.0 | 34.2 | 15.7 | 11.2 | 4.5 | 186.0 |
| 1957 | 18.9 | 18.5 | 37.4 | 16.8 | 11.5 | 5.3 | 199.0 |
| 1958 | 16.5 | 20.6 | 37.1 | 16.8 | 11.5 | 5.3 | 216.0 |
| 1959 ^{2/} | 18.6 | 20.3 | 38.9 | | | | |

^{1/} Year beginning July 1.^{2/} Subject to revision.

1960 Cigar Filler and Binder Allotments

The 1960 marketing quotas and acreage allotments for Connecticut Valley binder (types 51-52) and Ohio filler-Wisconsin binder (types 42-44 and 53-55) will be announced by February 1, 1960. Following the announcement growers will vote as to whether they favor marketing quotas on the 1960, 1961 and 1962 crops. At least two-thirds of the growers voting must approve if marketing quotas are to continue in effect next year. There are two referendums, one for the Connecticut Valley binder types and the other for the Ohio filler and Wisconsin binder types. In the last referendums on these tobaccos (held in February 1957) quotas were approved by 98 percent of those voting on the Connecticut Valley types and by 94 percent of those voting on the Ohio-Wisconsin types.

Supplies of Shadegrown Wrapper

The total supply of cigar wrapper types 61-62 for the July 1, 1959-June 30, 1960 marketing year is 38.9 million pounds--over $4\frac{1}{2}$ percent above a year earlier and a record high. Production in 1959 in the Connecticut Valley increased and was third largest on record and in the Georgia-Florida area rose even more and to a new high. Carryover for both types last July 1 was only slightly below the preceding year and the production increases placed supplies of each type above any previous year.

October 1 stocks of Connecticut Valley wrapper held by dealers and manufacturers were over a tenth higher than a year earlier but October 1 stocks of Georgia-Florida wrapper were down a little from a year earlier.

Domestic Use and Exports

Filler: Domestic use of Pennsylvania filler in the year ended September 30 at about 50 million pounds was well above the unusually low figure of a year earlier, but use of Ohio filler at less than 6 million pounds was a new low. The domestic use of Puerto Rican filler at almost 32 million pounds was up from the relatively low figure of a year earlier and the most in 5 years.

The great bulk of these filler types were used in cigar manufacture which showed an appreciable gain from 1957-58 to 1958-59. Exports of filler tobacco, though small in relation to domestic use, were larger in 1958-59 than for any year since 1949-50. Viet Nam took nearly nine-tenths of the $1\frac{1}{2}$ million pounds exported and France most of the remainder. The major part of the filler exported was Puerto Rican type 46.

Binder: The domestic use of the Connecticut Valley binder types 51-52 in the year ending September 30, 1959 at near 8 million pounds was only about three-fifths as much as a year earlier and only a third as much as 5 years ago. This drop in the past year's usings was greater than expected. The domestic use of Havana Seed type 52 fell more sharply than Broadleaf. The conversion from

natural leaf binders on cigars to processed sheet binder has had its sharpest impact on the Connecticut Valley growers and has greatly reduced leaf requirements for binder types from that area. Table 27 which shows stocks of tobacco sheet indicates that the Connecticut Valley binder types are the two most important constituent types utilized in binder sheet but there are also significant quantities of type 61 (Connecticut Valley Shadegrown) and type 41 (Pennsylvania filler) and also some type 55 (Northern Wisconsin). Exports of types 51-52 in 1958-59 also declined sharply to less than half as much as a year earlier and less than a third as much as 2 years earlier. Shipments of Havana Seed and Broadleaf to West Germany, the leading outlet, dropped 28 percent and 41 percent, respectively. Also, shipments to Denmark, Netherlands and Belgium fell sharply.

The domestic use of the Wisconsin cigar binder types 54-55 at 19½ million pounds in 1958-59 was down 16 percent from 1957-58. Use of type 54 was a record low, and of type 55, the lowest since 1940. Scrap chewing tobacco manufacture, a substantial outlet for type 54, held steady in 1958-59 but was 4 percent below 2 years ago. Thus far, the large shift to processed binders on cigars has affected usings of Northern Wisconsin type 55 to a lesser extent than the Connecticut Valley types. Exports of type 55 increased a little to exceed last year's record high while exports of type 54 held even with a year earlier. There was a substantial shipment to East Germany in 1958-59 in contrast to none in 1957-58 which more than offset the sharp decline in shipments to West Germany. These two outlets accounted for about nine-tenths of the total Wisconsin tobacco exports. France, Canary Islands and Belgium took most of the remaining exports of these types.

Wrapper: The July 1958-June 1959 domestic use of shade-grown wrapper, types 61-62, totaled 11.6 million pounds--slightly more than in 1957-58. The use of wrapper has stayed within a very narrow range in the past 4 years, despite the increase in cigar output. The greater proportion of cigarillos and smaller size cigars which take less wrapper per unit of output is the main reason for this. Exports of wrapper in the year ended June 30, 1959 just topped the previous year's high. West Germany takes about two-thirds of total wrapper exports and another tenth usually goes to Canada. In the first third of the 1959-60 marketing year exports of wrapper were down sharply from the year-earlier level. German takings were down nearly a half, and Canadian takings, nearly a fourth. There was a substantial shipment to the United Kingdom, far above the usual wrapper exports to that country.

Table 24.- Tobacco: Acreage in the United States, by types, for specified periods with percentages

| Period | Flue- cured 11-14 | Fire- cured 21-24 1/ | Burley 31 | Mary- land 32 | Dark air- and sun- cured 35-37 | Cigar | | | United States |
|------------------------|-------------------------|-------------------------------|----------------|---------------------|--|-----------------------|-----------------------|------------------|------------------|
| | | | | | | Filler 41-45 1/ | Binder 51-56 1/ | Wrapper 61-62 | |
| | | | | | | | | | |
| Averages | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres |
| 1924-28 | 893.7 | 224.4 | 322.2 | 31.2 | 85.9 | 68.1 | 64.0 | 9.6 | 1,700.3 |
| 1929-33 | 949.5 | 204.3 | 460.9 | 36.1 | 64.5 | 65.3 | 56.3 | 9.0 | 1,847.3 |
| 1934-38 | 863.2 | 135.2 | 347.2 | 36.7 | 42.0 | 38.7 | 29.2 | 8.9 | 1,501.3 |
| 1939-43 | 872.8 | 90.1 | 375.4 | 38.4 | 38.6 | 45.2 | 39.2 | 10.2 | 1,510.3 |
| 1944 | 1,017.3 | 64.7 | 496.6 | 45.0 | 40.2 | 37.9 | 37.3 | 10.5 | 1,749.9 |
| 1945 | 1,078.7 | 61.3 | 512.3 | 35.0 | 44.1 | 36.0 | 41.8 | 11.2 | 1,820.7 |
| 1946 | 1,188.8 | 91.6 | 489.0 | 50.0 | 40.8 | 39.0 | 48.8 | 12.5 | 1,960.8 |
| 1947 | 1,161.2 | 83.8 | 420.5 | 47.5 | 35.3 | 42.7 | 46.4 | 13.6 | 1,851.6 |
| 1948 | 883.8 | 62.6 | 432.0 | 46.6 | 29.9 | 43.6 | 39.7 | 15.1 | 1,553.6 |
| 1949 | 935.4 | 60.7 | 447.4 | 50.0 | 31.9 | 42.4 | 39.5 | 15.6 | 1,623.2 |
| 1950 | 958.4 | 52.9 | 408.3 | 50.0 | 28.7 | 45.1 | 41.5 | 13.7 | 1,599.0 |
| 1951 | 1,110.1 | 49.0 | 456.1 | 53.0 | 26.5 | 39.8 | 31.4 | 13.6 | 1,779.9 |
| 1952 | 1,111.3 | 47.4 | 463.5 | 50.0 | 26.3 | 29.4 | 30.4 | 13.1 | 1,771.8 |
| 1953 | 1,021.8 | 48.3 | 419.7 | 45.0 | 26.0 | 30.5 | 29.0 | 12.3 | 1,632.9 |
| 1954 | 1,042.2 | 52.0 | 420.9 | 50.0 | 25.9 | 33.8 | 29.4 | 13.0 | 1,667.5 |
| 1955 | 990.7 | 48.2 | 310.6 | 47.0 | 24.2 | 33.9 | 27.7 | 12.9 | 1,495.4 |
| 1956 | 875.3 | 47.0 | 309.8 | 43.5 | 22.4 | 32.9 | 19.0 | 13.3 | 1,363.5 |
| 1957 | 662.7 | 36.6 | 306.6 | 37.0 | 17.1 | 32.6 | 15.9 | 13.1 | 1,121.8 |
| 1958 | 639.4 | 31.1 | 297.1 | 34.0 | 14.3 | 33.0 | 15.9 | 12.9 | 1,077.9 |
| 1959 2/ | 696.3 | 35.1 | 301.2 | 38.0 | 15.3 | 34.9 | 19.0 | 13.8 | 1,153.8 |
| Percentage change | | | | | | | | | |
| | Per- cent | Per- cent | Per- cent | Per- cent | Per- cent | Per- cent | Per- cent | Per- cent | Per- cent |
| Av. 1947-49 to 1959 | -29.9 | -49.1 | -30.5 | -20.8 | -52.8 | -18.6 | -54.7 | -6.8 | -31.2 |
| 1958 to 1959 | 8.9 | 12.9 | 1.4 | 11.8 | 7.0 | 5.8 | 19.5 | 7.0 | 7.0 |

1/ Types 45, 56, and 24 ended in 1939, 1948, and 1949, respectively.

2/ Subject to revision.

Table 25.--Tobacco: Yield per acre in the United States, by types, for specified periods with percentages

| Period | Flue-cured 11-14 | Fire-cured 21-24 1/ | Burley 31 | Mary- land 32 | Dark air- and sun- cured 35-37 | Cigar | | | All types |
|-------------------|---------------------|---------------------------|--------------|---------------------|---|-----------------------|-----------------------|------------------|--------------|
| | | | | | | Filler 41-45 1/ | Binder 51-56 1/ | Wrapper 61-62 | |
| | Lb. | Lb. | Lb. | Lb. | Lb. | Lb. | Lb. | Lb. | Lb. |
| Average: | | | | | | | | | |
| 1924-28 | 676 | 767 | 807 | 781 | 784 | 1,340 | 1,256 | 1,041 | 765 |
| 1929-33 | 707 | 777 | 777 | 683 | 803 | 1,035 | 1,350 | 1,039 | 770 |
| 1934-38 | 856 | 811 | 819 | 749 | 837 | 1,266 | 1,465 | 954 | 865 |
| 1939-43 | 963 | 923 | 985 | 755 | 958 | 1,323 | 1,526 | 982 | 986 |
| 1944 | 1,069 | 1,022 | 1,189 | 850 | 1,116 | 1,440 | 1,548 | 1,075 | 1,115 |
| 1945 | 1,088 | 951 | 1,127 | 525 | 988 | 1,261 | 1,518 | 1,001 | 1,094 |
| 1946 | 1,137 | 1,189 | 1,256 | 925 | 1,215 | 1,469 | 1,519 | 1,000 | 1,181 |
| 1947 | 1,135 | 1,031 | 1,153 | 795 | 1,054 | 1,419 | 1,495 | 992 | 1,138 |
| 1948 | 1,233 | 1,170 | 1,396 | 750 | 1,165 | 1,566 | 1,524 | 998 | 1,274 |
| 1949 | 1,191 | 1,189 | 1,253 | 825 | 1,133 | 1,542 | 1,561 | 1,108 | 1,213 |
| 1950 | 1,312 | 1,102 | 1,222 | 800 | 998 | 1,474 | 1,548 | 1,130 | 1,269 |
| 1951 | 1,309 | 1,215 | 1,355 | 785 | 1,197 | 1,594 | 1,571 | 1,098 | 1,310 |
| 1952 | 1,229 | 1,228 | 1,403 | 805 | 1,286 | 1,590 | 1,532 | 1,124 | 1,273 |
| 1953 | 1,245 | 1,013 | 1,345 | 900 | 1,022 | 1,468 | 1,618 | 1,203 | 1,261 |
| 1954 | 1,261 | 1,197 | 1,586 | 875 | 1,317 | 1,681 | 1,642 | 1,264 | 1,346 |
| 1955 | 1,497 | 1,353 | 1,513 | 670 | 1,284 | 1,569 | 1,555 | 1,213 | 1,466 |
| 1956 | 1,625 | 1,501 | 1,635 | 840 | 1,514 | 1,665 | 1,763 | 1,290 | 1,596 |
| 1957 | 1,471 | 1,380 | 1,592 | 1,040 | 1,316 | 1,403 | 1,766 | 1,442 | 1,486 |
| 1958 | 1,691 | 1,391 | 1,567 | 910 | 1,258 | 1,621 | 1,719 | 1,283 | 1,611 |
| 1959 2/ | 1,550 | 1,496 | 1,660 | 875 | 1,436 | 1,728 | 1,783 | 1,350 | 1,560 |
| Percentage change | | | | | | | | | |
| | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. |
| Av. 1947-49: | | | | | | | | | |
| to 1959 | 30.7 | 32.4 | 31.0 | 10.8 | 28.6 | 14.5 | 16.8 | 30.7 | 29.1 |
| 1958 to | | | | | | | | | |
| 1959 | -8.3 | 7.5 | 5.9 | -3.8 | 14.1 | 6.6 | 3.7 | 5.2 | -3.2 |

1/ Types 45, 56, and 24 ended in 1939, 1948, and 1949, respectively.

2/ Subject to revision.

Table 26.--Acreage of tobacco in the United States, by class and type, annual 1955-58 and percentages

| Class and type | 1956 | 1957 | 1958 | 1959 | Per- centage change 1958 to 1959 |
|--|----------------|----------------|----------------|----------------|--|
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Percent |
| Old and Middle Belt, type 11 | 315.0 | 237.0 | 228.0 | 252.0 | 10.5 |
| Eastern North Carolina, type 12 | 282.0 | 218.0 | 213.0 | 224.0 | 5.2 |
| South Carolina, type 13 | 172.0 | 133.0 | 129.0 | 137.0 | 6.2 |
| Georgia and Florida, type 14 | 106.3 | 74.7 | 69.4 | 83.3 | 20.0 |
| Total flue-cured, types 11-14 | 875.3 | 662.7 | 639.4 | 696.3 | 8.9 |
| Virginia, type 21 | 8.5 | 6.9 | 6.8 | 7.7 | 13.2 |
| Kentucky and Tennessee, type 22 | 27.3 | 22.2 | 18.3 | 20.0 | 9.3 |
| Kentucky and Tennessee, type 23 | 11.2 | 7.5 | 6.0 | 7.4 | 23.3 |
| Total fire-cured, types 21-23 | 47.0 | 36.6 | 31.1 | 35.1 | 12.9 |
| Burley, type 31 | 309.8 | 306.6 | 297.1 | 301.2 | 1.4 |
| Maryland, type 32 | 43.5 | 37.0 | 34.0 | 38.0 | 11.8 |
| One Sucker, type 35 | 12.5 | 9.8 | 8.6 | 9.0 | 4.7 |
| Green River, type 36 | 6.8 | 4.7 | 4.1 | 4.2 | 2.4 |
| Virginia sun-cured, type 37 | 3.1 | 2.6 | 1.6 | 2.1 | 31.2 |
| Total dark air-cured, types 35-37 | 22.4 | 17.1 | 14.3 | 15.3 | 7.0 |
| Pennsylvania, Seedleaf, type 41 | 29.0 | 29.0 | 30.0 | 31.0 | 3.3 |
| Miami Valley, types 42-44 | 3.9 | 3.6 | 3.0 | 3.9 | 30.0 |
| Total cigar filler, types 41-44 | 32.9 | 32.6 | 33.0 | 34.9 | 5.8 |
| Connecticut Valley Broadleaf, type 51 | 4.3 | 2.8 | 2.0 | 2.8 | 40.0 |
| Connecticut Valley Havana Seed, type 52 | 2.9 | 1.5 | .9 | 1.7 | 88.9 |
| Southern Wisconsin, type 54 | 4.1 | 4.4 | 5.2 | 5.9 | 13.5 |
| Northern Wisconsin, type 55 | 7.7 | 7.2 | 7.8 | 8.6 | 10.3 |
| Total cigar binder, types 51-55 | 19.0 | 15.9 | 15.9 | 19.0 | 19.5 |
| Connecticut Valley Shade-grown, type 61 | 7.9 | 7.9 | 7.8 | 8.1 | 3.8 |
| Georgia and Florida Shade-grown, type 62 | 5.4 | 5.2 | 5.1 | 5.7 | 11.8 |
| Total cigar wrapper, types 61-62 | 13.3 | 13.1 | 12.9 | 13.8 | 7.0 |
| Louisiana Perique, type 72 | .3 | .2 | .2 | .2 | .0 |
| Total all types | 1,363.5 | 1,121.8 | 1,077.9 | 1,153.8 | 7.0 |

1/ Preliminary.

Table 27.--Tobacco leaf represented in stocks of tobacco sheet on specified dates ^{1/}

| | (Reported weight) | | | | |
|--|-------------------|-----------------|-----------------|-----------------|-----------------|
| | 1958 | 1959 | | | |
| | October 1 | January 1 | April 1 | July 1 | October 1 |
| | Thousand pounds | Thousand pounds | Thousand pounds | Thousand pounds | Thousand pounds |
| Flue-cured (types 11-14) | | | | | |
| Stemmed | 651 | 622 | 517 | 688 | 939 |
| Unstemmed | 0 | 0 | 0 | 3 | 266 |
| Sub total | 651 | 622 | 517 | 691 | 1,205 |
| Burley (type 31) | | | | | |
| Stemmed | 417 | 365 | 322 | 446 | 628 |
| Unstemmed | 0 | 0 | 0 | 0 | 177 |
| Sub total | 417 | 365 | 322 | 446 | 805 |
| Total for cigarettes (including smoking tobacco) | | | | | |
| Stemmed ^{2/} | 1,070 | 989 | 517 | 1,138 | 1,595 |
| Unstemmed | 0 | 0 | 0 | 3 | 478 |
| Subtotal | 1,070 | 989 | 517 | 1,141 | 3,203 |
| Maryland (type 32) | | | | | |
| Stemmed | 19 | 57 | 53 | 32 | 26 |
| Unstemmed | 0 | 0 | 0 | 3 | 3 |
| Sub total | 19 | 57 | 53 | 35 | 29 |
| Pennsylvania (type 41) | | | | | |
| Stemmed | 63 | 213 | 230 | 192 | 195 |
| Unstemmed | 160 | 151 | 155 | 230 | 187 |
| Sub total | 223 | 364 | 385 | 422 | 382 |
| Connecticut Valley (type 51) | | | | | |
| Stemmed | 214 | 345 | 405 | 372 | 154 |
| Unstemmed | 271 | 325 | 435 | 378 | 500 |
| Sub total | 485 | 670 | 840 | 750 | 654 |
| Connecticut Valley (type 52) | | | | | |
| Stemmed | 0 | 23 | 15 | 0 | 0 |
| Unstemmed | 249 | 356 | 428 | 477 | 534 |
| Sub total | 249 | 379 | 443 | 477 | 534 |
| Northern Wisconsin (type 55) | | | | | |
| Stemmed | 24 | 60 | 45 | 10 | 9 |
| Unstemmed | 115 | 16 | 32 | 109 | 111 |
| Sub total | 139 | 76 | 77 | 119 | 120 |
| Connecticut Valley (type 61) | | | | | |
| Stemmed | 135 | 231 | 286 | 314 | 362 |
| Unstemmed | 69 | 40 | 30 | 45 | 48 |
| Sub total | 204 | 271 | 316 | 359 | 410 |
| Total for Cigars ^{4/} | | | | | |
| Stemmed | 493 | 982 | 1,099 | 963 | 779 |
| Unstemmed | 869 | 908 | 1,039 | 1,260 | 1,404 |
| Sub total | 1,362 | 1,890 | 2,138 | 2,223 | 2,183 |
| Grand total for all types | 2,432 | 2,879 | 3,028 | 3,364 | 4,256 |

^{1/} Does not include tobacco stems added in manufacturing process.^{2/} Includes very small quantity of Maryland (type 32).^{3/} Includes 56,000 pounds of foreign grown tobacco.^{4/} For each date includes small quantities of Ohio (types 42-44), Puerto Rican (type 46), Cuban (type 81) and for some dates small quantities of Southern Wisconsin (type 54), Georgia-Florida (type 62) and Philippine Islands (type 83).

Table 28.--Tobacco: Acreage yield, production, stocks, supply, disappearance, price and crop value, United States and United States including Puerto Rico, for specified years (farm-sales weight)

| Crop year | Acreage | Yield | Production | Stocks | Supply | Disappearance 1/ | | | Av. price | Value of |
|----------------------------------|----------|-------|------------|----------|----------|------------------|----------|----------|-----------|-----------|
| | | | | | | Total | Domestic | Exports | | |
| | 1,000 a. | Lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Ct. | Mil. dol. |
| 1925 | 1,751 | 786 | 1,376 | 1,831 | 3,207 | 1,336 | 760 | 576 | 16.8 | 231 |
| 1926 | 1,628 | 792 | 1,289 | 1,871 | 3,160 | 1,363 | 788 | 575 | 17.9 | 231 |
| 1927 | 1,556 | 778 | 1,211 | 1,797 | 3,008 | 1,324 | 784 | 540 | 20.7 | 250 |
| 1928 | 1,864 | 737 | 1,373 | 1,684 | 3,057 | 1,420 | 787 | 633 | 20.0 | 274 |
| 1929 | 1,980 | 774 | 1,533 | 1,637 | 3,170 | 1,491 | 814 | 677 | 18.3 | 281 |
| 1930 | 2,124 | 776 | 1,648 | 1,679 | 3,327 | 1,401 | 767 | 634 | 12.8 | 211 |
| 1931 | 1,988 | 787 | 1,565 | 1,926 | 3,491 | 1,191 | 718 | 473 | 8.2 | 129 |
| 1932 | 1,405 | 725 | 1,018 | 2,300 | 3,318 | 1,179 | 743 | 436 | 10.5 | 107 |
| 1933 | 1,739 | 789 | 1,372 | 2,139 | 3,511 | 1,224 | 721 | 503 | 13.0 | 178 |
| 1934 | 1,273 | 852 | 1,085 | 2,287 | 3,372 | 1,152 | 757 | 395 | 21.3 | 225 |
| 1935 | 1,439 | 905 | 1,302 | 2,220 | 3,522 | 1,330 | 857 | 473 | 18.4 | 239 |
| 1936 | 1,441 | 807 | 1,163 | 2,192 | 3,355 | 1,331 | 885 | 446 | 23.6 | 274 |
| 1937 | 1,753 | 895 | 1,569 | 2,024 | 3,593 | 1,409 | 902 | 507 | 20.4 | 320 |
| 1938 | 1,601 | 866 | 1,386 | 2,183 | 3,569 | 1,435 | 921 | 514 | 19.6 | 270 |
| 1939 | 2,000 | 940 | 1,881 | 2,134 | 4,015 | 1,287 | 935 | 352 | 15.4 | 289 |
| 1940 | 1,410 | 1,036 | 1,460 | 2,728 | 4,188 | 1,179 | 990 | 189 | 16.1 | 234 |
| 1941 | 1,306 | 966 | 1,262 | 3,009 | 4,271 | 1,433 | 1,112 | 321 | 26.4 | 333 |
| 1942 | 1,377 | 1,023 | 1,408 | 2,838 | 4,246 | 1,592 | 1,274 | 318 | 36.9 | 520 |
| 1943 | 1,458 | 964 | 1,406 | 2,654 | 4,060 | 1,675 | 1,287 | 388 | 40.5 | 570 |
| 1944 | 1,750 | 1,115 | 1,951 | 2,385 | 4,336 | 1,946 | 1,407 | 539 | 42.0 | 820 |
| 1945 | 1,821 | 1,094 | 1,991 | 2,390 | 4,381 | 1,928 | 1,334 | 594 | 42.6 | 848 |
| 1946 | 1,961 | 1,181 | 2,315 | 2,453 | 4,768 | 2,012 | 1,355 | 657 | 45.1 | 1,044 |
| 1947 | 1,852 | 1,138 | 2,107 | 2,756 | 4,863 | 1,850 | 1,413 | 437 | 43.6 | 918 |
| 1948 | 1,554 | 1,274 | 1,980 | 3,013 | 4,993 | 1,922 | 1,417 | 505 | 48.2 | 955 |
| 1949 | 1,623 | 1,213 | 1,969 | 3,071 | 5,040 | 1,951 | 1,420 | 531 | 45.9 | 905 |
| 1950 | 1,599 | 1,269 | 2,030 | 3,089 | 5,119 | 1,975 | 1,451 | 524 | 51.7 | 1,049 |
| 1951 | 1,780 | 1,310 | 2,332 | 3,144 | 5,476 | 2,072 | 1,488 | 584 | 51.1 | 1,191 |
| 1952 | 1,772 | 1,273 | 2,256 | 3,404 | 5,660 | 2,055 | 1,557 | 498 | 49.9 | 1,125 |
| 1953 | 1,633 | 1,261 | 2,059 | 3,605 | 5,664 | 1,995 | 1,480 | 515 | 52.3 | 1,076 |
| 1954 | 1,668 | 1,346 | 2,244 | 3,669 | 5,913 | 1,936 | 1,420 | 516 | 51.1 | 1,147 |
| 1955 | 1,495 | 1,466 | 2,193 | 3,977 | 6,170 | 2,055 | 1,407 | 648 | 53.2 | 1,166 |
| 1956 | 1,364 | 1,596 | 2,176 | 4,115 | 6,291 | 1,927 | 1,370 | 557 | 53.7 | 1,169 |
| 1957 | 1,122 | 1,486 | 1,668 | 4,364 | 6,032 | 1,918 | 1,389 | 528 | 56.1 | 936 |
| 1958 2/ | 1,078 | 1,611 | 1,736 | 4,114 | 5,850 | 1,916 | 1,382 | 534 | 59.5 | 1,035 |
| 1959 2/ | 1,154 | 1,560 | 1,800 | 3,934 | 5,734 | | | | | |
| United States and Puerto Rico 3/ | | | | | | | | | | |
| 1935 | 1,483 | 895 | 1,328 | 2,280 | 3,608 | 1,357 | 884 | 473 | 18.3 | 243 |
| 1936 | 1,491 | 803 | 1,198 | 2,251 | 3,449 | 1,363 | 917 | 446 | 23.3 | 279 |
| 1937 | 1,816 | 888 | 1,613 | 2,086 | 3,699 | 1,449 | 942 | 507 | 20.1 | 325 |
| 1938 | 1,620 | 864 | 1,400 | 2,250 | 3,650 | 1,459 | 945 | 514 | 19.4 | 272 |
| 1939 | 2,033 | 939 | 1,909 | 2,191 | 4,100 | 1,318 | 966 | 352 | 15.3 | 293 |
| 1940 | 1,451 | 1,027 | 1,490 | 2,782 | 4,272 | 1,202 | 1,013 | 189 | 16.1 | 240 |
| 1941 | 1,348 | 960 | 1,294 | 3,070 | 4,364 | 1,464 | 1,143 | 321 | 26.2 | 339 |
| 1942 | 1,389 | 1,020 | 1,417 | 2,900 | 4,317 | 1,622 | 1,304 | 318 | 36.9 | 523 |
| 1943 | 1,494 | 960 | 1,434 | 2,695 | 4,129 | 1,690 | 1,302 | 388 | 40.5 | 581 |
| 1944 | 1,798 | 1,108 | 1,993 | 2,439 | 4,432 | 1,967 | 1,428 | 539 | 41.6 | 830 |
| 1945 | 1,857 | 1,089 | 2,023 | 2,465 | 4,488 | 1,957 | 1,363 | 594 | 42.5 | 860 |
| 1946 | 1,987 | 1,177 | 2,339 | 2,531 | 4,870 | 2,040 | 1,383 | 657 | 44.9 | 1,050 |
| 1947 | 1,884 | 1,132 | 2,133 | 2,830 | 4,963 | 1,882 | 1,444 | 438 | 43.4 | 925 |
| 1948 | 1,586 | 1,265 | 2,007 | 3,081 | 5,088 | 1,964 | 1,450 | 514 | 47.9 | 962 |
| 1949 | 1,659 | 1,203 | 1,995 | 3,124 | 5,119 | 1,979 | 1,446 | 533 | 45.6 | 910 |
| 1950 | 1,633 | 1,259 | 2,056 | 3,140 | 5,196 | 2,004 | 1,480 | 524 | 51.4 | 1,056 |
| 1951 | 1,814 | 1,301 | 2,360 | 3,192 | 5,552 | 2,106 | 1,522 | 584 | 50.8 | 1,200 |
| 1952 | 1,808 | 1,267 | 2,290 | 3,446 | 5,735 | 2,083 | 1,585 | 498 | 49.6 | 1,136 |
| 1953 | 1,673 | 1,251 | 2,093 | 3,652 | 5,745 | 2,027 | 1,512 | 515 | 51.9 | 1,086 |
| 1954 | 1,705 | 1,336 | 2,278 | 3,718 | 5,996 | 1,960 | 1,444 | 516 | 50.8 | 1,157 |
| 1955 | 1,530 | 1,453 | 2,223 | 4,036 | 6,259 | 2,086 | 1,438 | 648 | 52.8 | 1,174 |
| 1956 | 1,390 | 1,583 | 2,200 | 4,173 | 6,373 | 1,959 | 1,402 | 557 | 53.5 | 1,176 |
| 1957 | 1,148 | 1,476 | 1,695 | 4,414 | 6,109 | 1,945 | 1,417 | 528 | 55.6 | 943 |
| 1958 2/ | 1,102 | 1,600 | 1,762 | 4,164 | 5,926 | 1,950 | 1,414 | 536 | 59.1 | 1,042 |
| 1959 2/ | 1,179 | 1,549 | 1,826 | 3,976 | 5,802 | | | | | |

1/ For flue-cured and cigar wrapper, year beginning July 1; for all other types, Oct. 1. 2/Preliminary.
3/ Stocks held in Puerto Rico unavailable before 1936, which prevents extending series back to 1925.

Table 29.--Tobacco manufactures: Net sales, net income, and profit ratios, annual 1947-58, by quarters 1957-59

| Year and quarter | Net sales | Net income | | Profit | | | |
|------------------------|--------------------|--------------------------|-------------------------|--------------------------|-------------------------|---|-------------------------|
| | | Before Federal tax | After Federal tax | Per dollar of sales | | As percentage of stockholders equity (annual basis) | |
| | | | | Before Federal tax | After Federal tax | Before Federal tax | After Federal tax |
| | | | | | | | |
| | Million dollars | Million dollars | Million dollars | Cents | Cents | Percent | Percent |
| 1947 | 2,641 | 178 | 109 | 6.7 | 4.1 | 16.6 | 10.1 |
| 1948 | 3,081 | 257 | 159 | 8.3 | 5.2 | 22.0 | 13.7 |
| 1949 | 3,061 | 250 | 156 | 8.2 | 5.1 | 20.2 | 12.6 |
| 1950 | 3,129 | 281 | 152 | 9.0 | 4.9 | 21.3 | 11.5 |
| 1951 | 3,378 | 295 | 129 | 8.7 | 3.8 | 21.7 | 9.5 |
| 1952 | 3,702 | 285 | 120 | 7.7 | 3.2 | 19.8 | 8.4 |
| 1953 | 3,768 | 338 | 138 | 9.0 | 3.7 | 22.9 | 9.4 |
| 1954 | 3,672 | 329 | 156 | 9.0 | 4.2 | 21.5 | 10.2 |
| 1955 | 3,796 | 388 | 183 | 10.2 | 4.8 | 24.2 | 11.4 |
| 1956 | 3,959 | 413 | 197 | 10.4 | 5.0 | 24.6 | 11.7 |
| 1957 | 4,262 | 459 | 220 | 10.8 | 5.2 | 26.0 | 12.5 |
| 1958 | 4,649 | 521 | 249 | 11.2 | 5.4 | 28.2 | 13.5 |
| 1957 | | | | | | | |
| 1 | 936 | 90 | 44 | 9.6 | 4.7 | 21.0 | 10.3 |
| 2 | 1,066 | 111 | 52 | 10.4 | 4.9 | 25.4 | 11.9 |
| 3 | 1,119 | 131 | 62 | 11.7 | 5.5 | 29.3 | 13.9 |
| 4 | 1,141 | 127 | 62 | 11.1 | 5.4 | 28.3 | 13.8 |
| 1958 | | | | | | | |
| 1 | 1,036 | 111 | 53 | 10.7 | 5.1 | 24.6 | 11.8 |
| 2 | 1,172 | 129 | 61 | 11.0 | 5.2 | 28.2 | 13.3 |
| 3 | 1,225 | 140 | 67 | 11.4 | 5.5 | 30.3 | 14.5 |
| 4 | 1,216 | 141 | 68 | 11.6 | 5.6 | 29.7 | 14.3 |
| 1959 | | | | | | | |
| 1 | 1,114 | 121 | 58 | 10.9 | 5.2 | 25.1 | 12.0 |
| 2 | 1,264 | 145 | 70 | 11.5 | 5.5 | 29.5 | 14.2 |
| 3 | 1,277 | 151 | 72 | 11.8 | 5.6 | 30.3 | 14.4 |

Note: The 1947-50 data lack strict comparability with the series beginning 1951.

Compiled and adapted from Quarterly Financial Report for Manufacturing Corporations, Federal Trade Commission--Securities and Exchange Commission.

STATISTICAL SUMMARY

| Item | Unit or base period | 1958 | | 1959 | | | Last data as percentage of a year earlier |
|-----------------------------------|---------------------------|--------|-------|-------|-------|-------|---|
| | | Oct. | Nov. | Sept. | Oct. | Nov. | |
| Average price at auctions | | | | | | | |
| Flue-cured | Ct. per lb. | 59.4 | 55.0 | 58.2 | 55.3 | 52.0 | 95 |
| Burley | Ct. per lb. | Closed | 66.3 | C - 1 | C - 1 | 55.3 | 95 |
| Maryland | Ct. per lb. | C - 1 | C - 1 | C - 1 | C - 1 | C - 1 | --- |
| Virginia fire-cured | Ct. per lb. | C - 1 | C - 1 | C - 1 | C - 1 | C - 1 | --- |
| Ky.-Tenn. fire-cured | Ct. per lb. | C - 1 | C - 1 | C - 1 | C - 1 | C - 1 | --- |
| Ky.-Tenn. dark air-cured | Ct. per lb. | C - 1 | C - 1 | C - 1 | C - 1 | C - 1 | --- |
| Virginia sun-cured | Ct. per lb. | C - 1 | C - 1 | C - 1 | C - 1 | C - 1 | --- |
| Parity prices 1/ | | | | | | | |
| Flue-cured | Ct. per lb. | 61.1 | 61.3 | 61.5 | 61.3 | 61.5 | 100 |
| Burley | Ct. per lb. | 62.0 | 62.2 | 63.6 | 63.3 | 63.6 | 102 |
| Maryland | Ct. per lb. | 56.8 | 57.0 | 56.4 | 56.2 | 56.4 | 99 |
| Virginia fire-cured | Ct. per lb. | 42.1 | 42.2 | 41.9 | 41.7 | 41.9 | 99 |
| Ky.-Tenn. fire-cured | Ct. per lb. | 41.4 | 41.6 | 41.6 | 41.4 | 41.6 | 100 |
| Ky.-Tenn. dark air-cured | Ct. per lb. | 36.2 | 36.3 | 36.8 | 36.7 | 36.8 | 101 |
| Virginia sun-cured | Ct. per lb. | 37.8 | 37.9 | 38.0 | 37.9 | 38.0 | 100 |
| Pa. cigar filler | Ct. per lb. | 29.0 | 29.1 | 28.9 | 28.6 | 28.9 | 99 |
| Conn. Valley cigar binder | Ct. per lb. | 58.6 | 58.8 | 44.0 | 43.6 | 44.0 | 75 |
| Wis. binder and Ohio filler | Ct. per lb. | 31.0 | 31.1 | 31.8 | 31.7 | 31.8 | 102 |
| Puerto Rican filler | Ct. per lb. | 34.6 | 34.7 | 33.0 | 33.0 | 33.3 | 96 |
| Parity index 2/ | 1910-14=100 | 294 | 294 | 297 | 296 | 297 | 101 |
| Industrial production index 3/ | 1947-49=100 | 138 | 141 | 149 | 147 | 146 | 105 |
| Employment | Mil. | 65.3 | 64.7 | 66.3 | 66.8 | 65.6 | 101 |
| Personal income 4/ | Bil. dol. | 364 | 368 | 381 | 382 | 385 | 105 |
| | | | | | | | |
| | | 1956 | | 1959 | | | |
| | | Sept. | Oct. | Aug. | Sept. | Oct. | |
| Tax-paid removals | | | | | | | |
| Cigarettes | Bil. | 38.1 | 40.9 | 40.9 | 39.2 | 43.1 | 105 |
| Cigars and cigarillos | Mil. | 546.7 | 591.7 | 529.2 | 552.7 | 566.4 | 96 |
| Smoking tobacco | Mil. lb. | 6.7 | 7.6 | 6.1 | 6.3 | 6.6 | 87 |
| Chewing tobacco | Mil. lb. | 6.0 | 6.3 | 5.6 | 5.6 | 5.7 | 90 |
| Snuff | Mil. lb. | 3.1 | 3.3 | 2.7 | 2.9 | 2.9 | 88 |
| Accumulated from Jan. 1 | | | | | | | |
| Cigarettes | Bil. | 327 | 368 | 301 | 340 | 383 | 104 |
| Cigars and cigarillos | Mil. | 4,408 | 4,999 | 4,245 | 4,798 | 5,364 | 107 |
| Smoking tobacco | Mil. lb. | 56 | 63 | 48 | 54 | 61 | 97 |
| Chewing tobacco | Mil. lb. | 51 | 57 | 45 | 50 | 56 | 98 |
| Snuff | Mil. lb. | 26 | 29 | 22 | 25 | 28 | 97 |
| Tax-free removals | | | | | | | |
| Cigarettes | Bil. | 3.0 | 3.3 | 3.0 | 3.5 | 2.4 | 73 |
| Exports | Bil. | 1.5 | 1.8 | 2.0 | 2.3 | 1.0 | 56 |
| Cigars and cigarillos | Mil. | 8.8 | 8.6 | 9.0 | 9.9 | 7.9 | 92 |
| Smoking tobacco | Mil. lb. | .2 | .2 | .2 | .2 | .2 | 100 |
| Chewing tobacco | Mil. lb. | .1 | .1 | .1 | .1 | .1 | 100 |
| Accumulated from Jan. 1 | | | | | | | |
| Cigarettes | Bil. | 25.0 | 28.3 | 24.0 | 27.5 | 29.9 | 106 |
| Exports | Bil. | 13.4 | 15.2 | 13.1 | 15.3 | 16.3 | 107 |
| Cigars and cigarillos | Mil. | 63.2 | 71.7 | 69.5 | 79.4 | 87.3 | 122 |
| Smoking tobacco | Mil. lb. | 1.5 | 1.7 | 1.3 | 1.5 | 1.6 | 94 |
| Chewing tobacco | Mil. lb. | 1.0 | 1.1 | .7 | .9 | 1.0 | 91 |
| Wholesale price indexes 5/ | | | | | | | |
| Cigarettes (reg. nonfilter) | 1947-49=100 | 134.8 | | | 134.8 | | 100 |
| Cigars | 1947-49=100 | 106.6 | | | 106.6 | | 100 |
| Smoking tobacco | 1947-49=100 | 147.2 | | | 162.9 | | 111 |
| Plug chewing tobacco | 1947-49=100 | 121.2 | | | 142.4 | | 117 |
| Snuff | 1947-49=100 | 148.5 | | | 146.5 | | 100 |
| Consumer price indexes (urban) 6/ | | | | | | | |
| Cigarettes (reg. nonfilter) | 1947-49=100 | 134.1 | | | 143.9 | | 107 |
| Cigars | 1947-49=100 | 109.7 | | | 114.6 | | 104 |
| Imports of tobacco | | | | | | | |
| Cigarette leaf | Mil. lb. | 9.1 | 9.7 | 10.3 | 8.6 | 11.3 | 116 |
| Cigar tobacco 7/ | Mil. lb. | 3.7 | 5.1 | 3.5 | 3.6 | 3.2 | 63 |
| Accumulated from Jan. 1 | | | | | | | |
| Cigarette leaf | Mil. lb. | 78.7 | 88.4 | 74.8 | 83.4 | 94.7 | 107 |
| Cigar tobacco 7/ | Mil. lb. | 27.0 | 32.1 | 30.4 | 35.0 | 38.2 | 119 |

See footnotes at end of Statistical Summary.

Continued -

STATISTICAL SUMMARY--CONTINUED

| Item | Unit or base period | 1958 | | 1959 | | Last data as percentage of a year earlier | |
|--|---------------------------|------------|-----------|------------|-----------|---|-----|
| | | Sept. | Oct. | Aug. | Sept. | Oct. | |
| Exports of leaf tobacco | | | | | | | |
| (farm-sales weight) | | | | | | | |
| Flue-cured | Mil. lb. | 58.9 | 85.3 | 37.0 | 93.2 | 51.3 | 60 |
| Burley | Mil. lb. | 3.3 | 3.3 | 3.3 | 3.0 | 1.2 | 36 |
| Maryland | Mil. lb. | 1.3 | 1.6 | .7 | .7 | .8 | 50 |
| Virginia fire- & sun-cured | Mil. lb. | .1 | .2 | 1.0 | .4 | * | --- |
| Ky.-Penn. fire-cured | Mil. lb. | .9 | 2.7 | .9 | 2.8 | 2.0 | 74 |
| Ky.-Penn. dark air-cured | Mil. lb. | .2 | .1 | * | .2 | .1 | 100 |
| Black Fat | Mil. lb. | .3 | .5 | .5 | .6 | .3 | 60 |
| Cigar wrapper | Mil. lb. | .5 | .3 | .5 | .4 | .1 | 33 |
| Connecticut binder | Mil. lb. | .1 | .1 | .1 | .2 | .1 | 100 |
| Wisconsin binder | Mil. lb. | * | * | .2 | .4 | * | --- |
| Accumulated from beginning of marketing year 8/ | | | | | | | |
| Flue-cured | Mil. lb. | 129.2 | 214.5 | 54.9 | 148.1 | 199.4 | 93 |
| Burley | Mil. lb. | 28.1 | 3.3 | 31.8 | 34.8 | 1.2 | 36 |
| Maryland | Mil. lb. | 11.7 | 1.6 | 12.5 | 15.3 | .8 | 50 |
| Virginia fire- & sun-cured | Mil. lb. | 6.0 | .2 | 5.0 | 5.4 | * | --- |
| Ky.-Penn. fire-cured | Mil. lb. | 22.8 | 2.7 | 15.7 | 18.5 | 2.0 | 74 |
| Ky.-Penn. dark air-cured | Mil. lb. | 2.3 | .1 | 3.3 | 3.5 | .1 | 100 |
| Black Fat | Mil. lb. | 5.0 | .5 | 4.4 | 5.0 | .3 | 60 |
| Cigar wrapper | Mil. lb. | 1.8 | 2.1 | .8 | 1.2 | 1.3 | 62 |
| Connecticut binder | Mil. lb. | 1.9 | .1 | .6 | .8 | .1 | 100 |
| Wisconsin binder | Mil. lb. | 2.5 | * | 2.4 | 2.7 | * | --- |
| Exports of manufactured tobacco | | | | | | | |
| in bulk | Mil. lb. | .5 | .3 | 1.0 | 1.9 | .2 | 67 |
| Accumulated from Jan. 1 | Mil. lb. | 5.7 | 6.0 | 5.5 | 7.3 | 7.5 | 125 |
| Q u a r t e r l y d a t a | | | | | | | |
| | | 1958 | | 1959 | | | |
| | | July-Sept. | Oct.-Dec. | July-Sept. | Oct.-Dec. | | |
| Tobacco stocks--1st of quarter 9/ | | | | | | | |
| Domestic types | | | | | | | |
| (farm-sales weight) | | | | | | | |
| Flue-cured | Mil. lb. | 2,308 | 2,609 | 2,210 | 2,555 | | 98 |
| Burley | Mil. lb. | 1,412 | 1,285 | 1,366 | 1,236 | | 96 |
| Maryland | Mil. lb. | 77 | 80 | 77 | 74 | | 92 |
| Fire-cured | Mil. lb. | 146 | 133 | 135 | 122 | | 92 |
| Dark air- and sun-cured | Mil. lb. | 85 | 78 | 75 | 69 | | 88 |
| Cigar filler | Mil. lb. | 200 | 174 | 195 | 164 | | 94 |
| Cigar binder | Mil. lb. | 95 | 85 | 89 | 82 | | 96 |
| Cigar wrapper | Mil. lb. | 21 | 24 | 20 | 25 | | 104 |
| Under Government loan 10/ | Mil. lb. | 1,007 | 1,034 | 1,004 | 901 | | 87 |
| Tobacco sheet 11/ | | | | | | | |
| Cigarette types | Mil. lb. | 1.4 | 1.1 | 1.1 | 2.1 | | 191 |
| Cigar types | Mil. lb. | 1.5 | 1.4 | 2.2 | 2.2 | | 157 |
| Foreign types (unst. equiv.) | | | | | | | |
| Cigarette and smoking | Mil. lb. | 237 | 210 | 236 | 209 | | 100 |
| Cigar | Mil. lb. | 26 | 27 | 43 | 44 | | 163 |
| Tobacco outlets 12/ | | | | | | | |
| Seasonally adjusted data, | | | | | | | |
| annual rates, for charts, p.2: | | | | | | | |
| Cigarettes | | | | | | | |
| Production | Bil. | 481 | 489 | 508 | 497 | | 102 |
| Tax-paid removals | Bil. | 446 | 455 | 468 | 464 | | 102 |
| Cigar & cigartillo production: | Bil. | 6.83 | 6.84 | 7.24 | 6.74 | | 99 |
| Smoking production | Mil. lb. | 75.0 | 75.0 | 73.7 | 70.6 | | 94 |
| Chewing production | | | | | | | |
| Scrap | Mil. lb. | 31.3 | 34.3 | 32.8 | 31.4 | | 92 |
| Plug and other | Mil. lb. | 36.8 | 36.4 | 34.6 | 37.6 | | 103 |
| Snuff production | Mil. lb. | 35.6 | 35.6 | 34.9 | 34.2 | | 96 |
| Exports of leaf (farm-sales | | | | | | | |
| Total weight) | Mil. lb. | 520 | 600 | 538 | 532 | | 89 |
| Flue-cured | Mil. lb. | 442 | 509 | 435 | 457 | | 90 |

1/ Based on data for month specified. 2/ Prices paid by farmers including interest, taxes and wage rates. 3/ Seasonally adjusted. 4/ Seasonally adjusted, annual rate. 5/ Excise tax excluded. 6/ Federal and applicable state and local taxes included. 7/ Unstemmed equivalent. 8/ July 1 for flue-cured and cigar wrapper and October 1 for others.

9/ Holdings of manufacturers and dealers including grower cooperatives. 10/ Reported by grower cooperatives.

11/ Weight of tobacco leaf not including stems added. 12/ Data for most recent quarter are preliminary estimates.

*Less than 50,000 pounds.

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: The next issue of The :
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